If you should find an error within this document please notify Lisa Schwarzbek at l.schwarzbek@ieee.org.

This document is regularly reviewed and updated. Changes are marked by underline and editor information.

The most recent review was conducted on 8 May 2009.
Purpose

The IEEE Signal Processing Society strives to offer the best possible Conferences that advance the study and application of signal processing. Organizing outstanding Conferences takes the effort of willing volunteers. This handbook provides information on how to organize a Conference within the policies and procedures of the IEEE Signal Processing Society.

Policy statements are indicated by the icon. These policies must be followed, unless the SPS Executive Director or current Vice President, Conferences grants an exception.

On behalf of the Signal Processing Society, we would like to thank you for your organizing efforts and wish you success with your workshops and conferences.

IEEE Signal Processing Society

Executive Office and Staff
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Conference Board & IEEE Signal Processing Office

2009 Conference Board

(sp.bd.conference@ieee.org)

Chair____________________________________V. John Mathews
Treasurer____________________________________Sergios Theodoridis
Vice President-Finance__________________________Petar Djuric
*Executive Director. ____________________________Mercy Kowalczyk
ICASSP 2008 ___________________________________________________________________________________________ Ali Sayed
ICASSP 2009 ___________________________________________________________________________________________ Lin-Shan Lee
ICASSP 2010 ___________________________________________________________________________________________ Scott Douglas
ICIP 2008 ______________________________________________________________________________________________ Rama Chellappa
ICIP 2009 ______________________________________________________________________________________________ Magdy Bayoumi
ICIP 2010 _______________________________________________________________________________________________ Wan-Chi Siu
Audio and Electroacoustics TC ________________________________Walter Kellermann
Design and Implementation of SP Systems TC __________________________Shuvra Bhattacharyya
Image, Video, and Multidimensional SP TC _____________________John Apostolopoulos
Signal Processing Education TC __________________________________Roxana Saint-Nom
Signal Processing Theory and Methods TC ___________________________Ali Sayed
Standing Committee on Industry and DSP Tech TC____________________John McElvain
Member-At-Large________________________________________________________________________Alberto Carini
Member-At-Large/Secretary____________________________________________________________Ken Sugiyama

2009 Conference Board Executive Subcommittee

(sp.bd.cbes.conference@ieee.org)

Chair____________________________________V. John Mathews
Treasurer____________________________________Sergios Theodoridis
Vice President-Finance__________________________Petar Djuric
*Executive Director. ____________________________Mercy Kowalczyk
ICASSP/ICIP Representative ________________________Scott Douglas
Member-At-Large/Secretary_______________________________Ken Sugiyama

* Denotes ex officio member
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<td>Administrator, Conference Compliance and Budgets</td>
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<td>Templates; forms; TCS; Budgets; Timelines</td>
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Signal Processing Staff Support

What can I expect from the Signal Processing Staff?

The Signal Processing Staff is committed to making your organizing experience positive and productive. The Society has two staff persons dedicated to Conferences: Lisa Schwarzbek, Manager Conference Services and Linda Skeahan, Administrator, Conference Compliance and Budgets. Lisa and Linda divide their responsibilities as outlined below. However, both are capable to providing support in all areas of conference organization.

Lisa Schwarzbek:

- Activities of the VP Conferences and the Conference Board
- Contracts, Audits, Statistics
- Projects [RFP’s, Surveys, Procedures, etc]
- ICASSP and ICIP proposals and Site Visits
- Issues

Linda Skeahan:

- Templates, Forms, MOUs
- Sponsorships, Technical Co-Sponsorships
- Budgets and all things financial
- Compliance [Timelines, Policy, etc]

Signal Processing Staff will guide you through the IEEE requirements and policies by providing information, forms, reminders, and advice. For the sake of simplicity the staff request that you send all forms, reports, contracts, MOUs, etc. directly to them. They will work with you to make sure that all requirements are present. Once a document is ready for IEEE processing, the staff will guide the documents through the processes.

In addition to this organizational support, the staff has extensive experience with conference organizing and can provide advice upon request. You may contact them to help negotiate a contract, assist with developing a budget, research hotels or meeting organizers and more.

Procedures where SPS staff has a key role are noted with an 👁 icon.
Guide to Conference Organizers Handbook

Introduction

This handbook is applicable to Signal Processing Society sponsored conferences, symposiums, and workshops. Conferences are programs which expect 300 or more registrants. Symposiums are programs of 100 – 300 expected registrants. A program with fewer than 100 registrants is a workshop. For ease of understanding this handbook uses the term Conference for all three types of programs.

For information regarding Technical Co-Sponsorships please contact the Signal Processing Society Staff.

This handbook is organized in the order that a typical conference organization committee is comprised. We have included some advice for successful conference organization.

Signal Processing Society (SPS) policies are highlighted throughout this handbook with the ◐ icon.

When a Form is required the ◆ icon will appear. Most forms can be found online. It is critical that all required documentation for conferences be routed through your Signal Processing staff via the sp.conferences.info@ieee.org e-mail address. Misdirected documents will cause delays, confusion, and errors. The Signal Processing Society has several policies and procedures that are unique and mandatory.

Some procedures performed by IEEE staff can take up to several days. Procedure time expectations are highlighted with the ☐ icon.

Online Resources

When the ◆ icon appears this is a recommendation to find additional information on the http://www.signalprocessingsociety.org/conferences/conference-resources/ web site.
Annual Conferences

International Conference on Acoustics, Speech and Signal Processing (ICASSP)

ICASSP is solely sponsored by the Signal Processing Society with the Technical Program supported by all of the Signal Processing Society Technical Committees:

- Audio and Electroacoustics
- Bio Imaging and Signal Processing
- Design and Implementation of Signal Processing Systems
- Image, Video, and Multidimensional Signal Processing
- Industry DSP Technology Standing Committee
- Information Forensics and Security
- Machine Learning for Signal Processing
- Multimedia Signal Processing
- Sensor Array and Multichannel
- Signal Processing Education
- Signal Processing for Communications and Networking
- Signal Processing Theory and Methods
- Speech and Language Processing

ICASSP takes place in the spring (March – May) each year and is typically 5 days of programs.

ICASSP hosts Signal Processing Society administrative meetings including Board of Governors (BoG), Executive Committee (ExCom), Publications Board, Conference Board, Panel of Editors, Technical Committee Steering Committees, etc.

ICASSP draws 1500 – 2500 delegates from all IEEE regions.

ICASSP Awards may include:

- Society Award
- IEEE Signal Processing Society Magazine Best Paper Award
- IEEE Signal Processing Society Magazine Best Column Award
- Technical Achievement Award
- Meritorious Service Award
- Signal Processing Society Education Award
- ICASSP Best Paper Awards
- IEEE Jack S. Kilby Signal Processing Medal
- IEEE Signal Processing Society Fellows

ICASSP Exhibits include:

- IEEE Membership
- Signal Processing Society (Membership, ICASSP next destination)

ICASSP Social Functions include:

- Welcome Reception
- Student Reception
Site Selection Process

The sites for ICASSP are ideally selected four to five years in advance.

A Signal Processing member who is interested in hosting an ICASSP (bidder) must submit a proposal to the Conference Board six (6) months prior to the next Conference Board meeting at ICASSP.

The proposals should be developed like a marketing campaign with images and inviting information about the destination.

The proposal must include the following information:

- **Summary**
  - Why this city?
  - Airport information
  - Customs and Visa regulations
  - Hotel and convention center information (i.e. space diagrams, maps, etc.)
  - Tourist destinations (i.e. museums, natural wonders, etc.)
  - Average weather conditions for the time of year
- **Organizing Committee Members**
  - Name
  - Membership status and number
  - Biographical information
- **Technical Program support from a number of SPS Technical Committees**
- **Proposed Dates**
- **Support that can be anticipated from the local government, universities and or corporations.**

Submission of Proposal

The bidders must submit the proposal to the Conference Services Manager three (3) months prior to the ICASSP being held five (5) years prior to the bidder’s chosen year.

Proposal must be emailed to l.schwarzbek@ieee.org. All proposals will be posted on the Signal Processing Society Conference Board web site. This is an internal web site.

Proposal Presentation

The complete Conference Board members review the proposal before the ensuing presentation at the next ICASSP.

At ICASSP the proposing group will present to the Conference Board the proposal and answer questions from the Board. The presentation is limited to 10 minutes and may include slides and printed materials. Following the presentation there is a Q&A period of 10 minutes.

After all presentations are completed the Conference Board will have a closed session to discuss the proposals. After discussion, the Board will vote on which proposal should move forward for further consideration.
Site Visit

The Conference Board will request the SPS staff to conduct a site visit of the proposed cities they wish to further consider. The bidder will be asked to coordinate with SPS Staff for a site visit. The site visit should take place between May and July of that year.

SPS Staff site visit should include hotels, convention center and local attractions. They are typically four full days of meetings, tours and travel. It is recommended that the local Convention and Tourism Bureau (CVB) and/or Destination Management Company (DMC) supply a guide to assist the team with the site visit. However, please note that the SPS Staff person is there to build a detailed report of the site and to get a sense of the area from the perspective of a conference attendee.

Proposal Approval

The SPS staff will report their observations to the Conference Board. The Conference Board will vote for a recommendation to send to the Board of Governors. The Board or Governors will consider the recommendation. The time between a site visit and a Board of Governors decision can be as long as one year.

Once your proposal is approved you will be contacted by the Conference Board Vice President and SPS Staff to welcome you. You will be asked to complete paperwork and prepare several documents as outlined in the remainder of this handbook.

However, please note that the SPS Staff person is there to build a detailed report of the site and to get a sense of the area from the perspective of a conference attendee. The Site Visit Report includes over 100 factors that range from meeting room conditions to local attractions. To see the 24-page template for a typical site visit report contact the Conference Services Manager.

Decision-making Factors

The Conference Board considers several factors into the decision to approve or reject a proposal. These factors include:

- Budget
- Conference Location History
- Destination Appeal
- Organizing Committee
- Site Visit Report
- Technical Program merits

The Conference Board may withhold approval based upon any one of the above noted factors. It is recommended that a bidder openly consider recommendations from the Board such as Organization Committee composition or the year chosen to hold the conference.

International Conference on Image Processing (ICIP)

ICIP is solely sponsored by the Signal Processing Society with the Technical Program primarily supported by the Image, Video, and Multidimensional Signal Processing Technical Committee.

ICIP takes place in the fall (September – October) each year and is typically 4 days of programs.

ICIP hosts Signal Processing Society administrative meetings including Board of Governors (BoG), Executive Committee (ExCom), Long Range Planning, Publications Board, Conference Board, and the IVMSP Technical Committee Steering Committee, etc.

ICIP draws 1000 – 2000 delegates from all IEEE regions.
ICIP Exhibits include:
- IEEE Membership
- Signal Processing Society (Membership, ICIP next destination)

ICIP Social Functions include:
- Welcome Reception
- Student Reception

**Site Selection Process**

The sites for ICIP are ideally selected four to five years in advance.

ICIP is overseen by the Image, Video and Multidimensional Signal Processing (IVMSP) Technical Committee. The IVMSP vets the ICIP proposals and provides the technical oversight of the ICIP. Please see the "Submission of Proposal" section below for additional details about the IVMSP TC's involvement and oversight for ICIP.

**Proposal Document**

The proposals should be developed like a marketing campaign with images and inviting information about the destination.

The proposal must include the following information:

- **Summary**
  - Why this city?
  - Airport information
  - Customs and Visa regulations
  - Hotel and convention center information (i.e. space diagrams, maps, etc.)
  - Tourist destinations (i.e. museums, natural wonders, etc.)
  - Average weather conditions for the time of year

- **Organizing Committee Members**
  - Name
  - Membership status and number
  - Biographical information

- **Technical Program support from the Image, Video and Multidimensional Signal Processing Technical Committee**

- **Proposed Dates**

- **Support that can be anticipated from the local government, universities and or corporations.**

**Submission of Proposal**

The proposal process: Proposals for ICIP are accepted five (5) years prior to the bidding year. For example if you wish to bid on the 2014 ICIP, you would submit your proposal in 2009. The proposal must be sent to IVMSP. IVMSP will vet the proposal and forward their recommendation onto the Conference Board.

Note: The Conference Board recommends that the proposing member consider two or more years to host the conference. Multiple year options give the Board more flexibility for decision-making.
The proposer(s) must present their proposal to IVMSP technical committee. The proposer is strongly encouraged to personally present their proposal to the IVMSP TC during the TC meeting at ICASSP, before the ICIP when they would nominally present to the Conference Board. This gives the presenter and the TC the opportunity to discuss in person potential improvements to the proposal. Note that the IVMSP TC will primarily focus on the technical program aspects of the proposal, and therefore the presentation should emphasize these aspects.

The IVMSP TC is responsible for approving the Technical Program Chair or Co-chairs, and either the Chair or one of the Co-chairs must be a current or former member of the TC. The IVMSP TC is responsible for approving the technical topics to be included in the Call for Papers. The TC is responsible for approving the review process for papers submitted to ICIP. Details about the IVMSP TC’s assistance and oversight for ICIP are described in the IVMSP TC’s Bylaws (http://www.signalprocessingsociety.org/technical-committees/list/ivmsp-tc/ivmsp-tc-bylaws/). Please contact the TC chair, identified on the IVMSP TC website (http://www.signalprocessingsociety.org/technical-committees/list/ivmsp-tc/), if you have any questions.

The IVMSP TC will discuss the technical merits of the proposal and determine if it meets with the committee’s standards. Once the IVMSP TC has endorsed a proposal they will submit the proposal to the Conference Board three (3) months prior to the next Conference Board meeting at ICIP. SPS staff will invite the IVMSP TC recommended bidders to present their proposal at the Conference Board meeting at ICIP. Note that a Signal Processing member who is interested in hosting an ICIP must obtain the IVMSP TC endorsement before the SPS Conference Board will accept the proposal.

IVMSP TC approved proposals will be posted on the Signal Processing Society Conference Board website. This is an internal web site.

**Proposal Presentation**

The complete Conference Board members review the proposal before the ensuing presentation at the next ICIP.

At ICIP the proposing group will present to the Conference Board the proposal and answer questions from the Board. The presentation is limited to 10 minutes and may include slides and printed materials. Following the presentation there is a Q&A period of 10 minutes.

After all presentations are completed the Conference Board will have a closed session to discuss the proposals. After discussion, the Board will vote on which proposal should move forward for further consideration.

**Site Visit**

The Conference Board will request the SPS staff to conduct a site visit of the proposed cities they wish to further consider. The bidder will be asked to coordinate with SPS Staff for a site visit. The site visit should take place between January and April of that year.

SPS Staff site visit should include hotels, convention center and local attractions. They are typically four full days of meetings, tours and travel. It is recommended that the local Convention and Tourism Bureau (CVB) and/or Destination Management Company (DMC) supply a guide to assist the team with the site visit.

However, please note that the SPS Staff person is there to build a detailed report of the site and to get a sense of the area from the perspective of a conference attendee. The Site Visit Report includes over 100 factors that range from meeting room conditions to local attractions. To see the 24-page template for a typical site visit report contact the Conference Services Manager.
Proposal Approval

The SPS staff will report their observations to the Conference Board. The Conference Board will vote for a recommendation to send to the Board of Governors. The Board or Governors will consider the recommendation. The time between a site visit and a Board of Governors decision can be as long as one year.

Once your proposal is approved you will be contacted by the Conference Board Vice President and SPS Staff to welcome you. You will be asked to complete paperwork and prepare several documents as outlined in the remainder of this handbook.

Decision-making Factors

The Conference Board considers several factors into the decision to approve or reject a proposal. These factors include:

- Budget
- Conference Location History
- Destination Appeal
- Organizing Committee
- Site Visit Report
- Technical Program merits

The Conference Board may withhold approval based upon any one of the above noted factors. It is recommended that a bidder openly consider recommendations from the Board such as Organization Committee composition or the year chosen to hold the conference.

International Symposium on Biomedical Imaging (ISBI)


Steering Committee Charter

The Charter (14 November 2002) governing the ISBI established a Steering Committee comprised of a Chair, alternating between Societies every conference, three persons from each society to be named by the Society Presidents each having one vote, the Executive Directors for the Societies serving ex-officio without vote and one representative of NIH/NIBIB without vote. Where possible, this committee should include some past, present and/or future ISBI Conference Chairs. The position of Chair will alternate between Societies every conference. The Steering Committee will operate under the guidelines of Robert’s rules and the Chair will vote only in the event of a tie. At least one new member will be appointed by each society after each ISBI and the tenure of the longest serving member from each society will end coincident with that appointment. In order to assure continuity, at least one existing member from each society will continue on the Committee.

<<MOU under revision by Conference Executive Subcommittee>>
Signal Processing Society Board and Committee Meetings

ICASSP and ICIP host SPS meetings

ICASSP and ICIP must include the costs of the SPS meetings within the conference budget. These costs may include room rental, AV support, food & beverage, etc.

ICASSP hosts the following meetings:

- Technical Committee Editorial Board (13)
- Technical Committee Meeting (13)
- Executive Committee (Lunch)
- Publications Board (Dinner)
- Conference Board (Dinner)
- Technical Directions Board
- Awards Board
- Long Range Planning Board
- ICASSP to ICASSP
- Board of Governors (Breakfast, Lunch)
- Associate Editors Training (hors d’oeuvres)

ICIP hosts the following meetings:

- IVMDSP Technical Committee Editorial Board (1)
- IVMDSP Technical Committee Meeting (1)
- Executive Committee (Lunch)
- Publications Board (Dinner)
- Conference Board (Dinner)
- Technical Directions Board
- Awards Board
- Long Range Planning Board
- ICIP to ICIP
- Board of Governors (Breakfast, Lunch)

For more information please contact SPS staff. The staff has a generic guide to the meeting needs that should be used to develop the budget for this line item. Staff will also assist with the meeting schedule, AV requirements, food & beverage needs, room set up needs, and more during the planning process.

Organizing Committee

The Signal Processing Society Bylaw 704

A technical meeting Organizing Committee shall be appointed to manage any and all aspect of a technical meeting sponsored by the Society. Such Organizing Committee shall be chaired by the technical meeting General Chair and shall typically comprise individuals to serve as Chairs of the following:
The members of the Organizing Committee shall be appointed by the technical meeting General Chair with the advice and consent of the Society’s Conference Board. Members shall serve a term of office coincident with the planning, execution, and closeout activities for the technical meeting.

Organizing Committee members may make administrative decisions on behalf of the technical meeting, pursuant to the rules and practices of the Society and of the IEEE.

A General Chair may act as a Finance Chair as described in this handbook or he/she may wish to appoint a colleague to this considerable responsibility. With that in mind the General Chair and Finance Chair responsibilities are divided in this handbook.

**General Chair**

The General Chair is responsible for the overall organization and coordination of all other committees necessary to plan and administer the conference.

Key Responsibilities:

- Determine the Organizing Structure for the Conference
- Approval of all arrangements and actions taken by the Committee
- Manage planning timeline
- Determine the Topic, Scope, Dates and Location
- Submit your Conference Information Proposal to IEEE
- Select and direct Conference Management Services company
- Obtain Sponsorship(s)
- Serve and/or Report to the SPS Conference Board

**Determine the Organizing Structure for the Conference**

**Organizing Committee**

Extreme care should be taken in selection of the members of the Organizing Committee for several reasons. Members should be of sufficient stature within their organization, profession and IEEE to assure they can obtain cooperation and handle the job. All key appointees must have agreement from their employer when they accept conference responsibility. Management must be aware of, and agree to, the commitment being made.

The first criteria for selection are, of course, the individual talents (organizational, leadership, etc.) which are necessary to efficiently plan and run a successful conference. It is beneficial to have on the Committee, members who have held several offices within IEEE (such as within local Section or Chapter). They should also be competent managers, preferably with business experience and a well-
rounded technical background. Ideally, appointments will be made from as many organizations as possible to give as broad a perspective as possible to the available talent and, in addition, draw from as wide a support base as possible. For the highly intensive committees the key qualities in the selection of a chair are energy, dedication, commitment, and attention to detail.

All committee members are required to complete a Principles of Business Conduct/Conflict of Interest disclosure form. ([Principles of Business Conduct and Conflict of Interest Form](#))

**Manage Planning Timeline**

**Importance of Timeliness**

IEEE measures the success of a Conference on several factors. Factors such as quality and value are somewhat subjective and can be measured through surveys and the analysis of trends. Factors such as how well a conference was organized and supported are measured in part by timeliness. The submissions of the Close Report for audit as well as the submission of the proceedings for Xplore publications are measured regularly.

**Timeline Worksheet**

The worksheet below is a fundamental timeline based upon model circumstances. Your Conference may require additional planning time based upon several factors including but not limited to host country requirements, sponsorship status, and committee experience.

Double click on the table to activate the MS Excel functions. Enter information in green shaded cells only. [This feature does not work in Adobe Acrobat PDF format.]
### IDEAL TIME BEFORE EVENT

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<th>ACTION OR MILESTONE</th>
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<th>Finish</th>
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#### IDEAL TIME AFTER EVENT

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<th>ACTION OR MILESTONE</th>
<th>Start</th>
<th>Finish</th>
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</thead>
<tbody>
<tr>
<td>10-Jan-10 to 10-Jan-10</td>
<td>SUBMIT CONFERENCE PROCEEDINGS/CONTENT Xplore CD.</td>
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</tr>
<tr>
<td>17-Jan-10 to 17-Jan-10</td>
<td>Send Post Event Surveys</td>
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</tr>
<tr>
<td>31-Jan-10 to 31-Jan-10</td>
<td>Repay Loans</td>
<td></td>
</tr>
<tr>
<td>31-Jan-10 to 31-Jan-10</td>
<td>Submit Post Conference Report to SPS</td>
<td></td>
</tr>
<tr>
<td>3-Apr-10 to 3-Apr-10</td>
<td>Distribute Surplus</td>
<td></td>
</tr>
<tr>
<td>3-Apr-10 to 3-May-10</td>
<td>Close Concentration Bank Account</td>
<td></td>
</tr>
<tr>
<td>2-Jul-10 to 1-Aug-10</td>
<td>Submit Audit Report to SPS</td>
<td></td>
</tr>
</tbody>
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### Determine the Topic, Scope, Dates and Location

#### Topic and Scope

The topic may be an existing field of interest or a new technology. The scope of the conference will depend on a variety of factors, such as:

- Conferences such as ICASSP and ICIP
- Number of delegates: 1000
- First day of meeting: 1-Jan-10
- Last day of meeting: 3-Jan-10
Historical structure of the conference
Breadth of the field of interest
Will the conference cover just one part of a topic or a larger part of the technical field?
Are there geographical considerations with regard to the scope?
How mature is the technology?
Will the topic be of interest to both industry and academics, both seasoned professionals and students?
Will there be exhibits?
Will there be tutorials?
Will there be publications?

**Signal Processing Society Constitution – Technical Meetings**

- Article VIII – Section 2
  - Technical meetings of the Signal Processing Society shall be open on an equal basis to all members of the IEEE. The Society may not sponsor or co-sponsor technical meetings that are subject to clearance.

**Dates and Location**

The dates and location of the Conference are strongly linked to the selected topic and scope of the Conference. In that you should host the Conference in a location that would be desirable to your core audience and not too difficult for international travel.

On the other hand, Signal Processing is committed to reaching the underserved areas of the world.

- The dates and length of conference depend on
- Is there a certain time of the year this conference should be held based upon history or topic?
- How many days?
- Availability of adequate facilities in the desired location
- Avoid holidays
- Consider local customs
- The location of the Conference depends on
- ICASSP does not repeat a location until after 10 years
- ICASSP and ICIP should be held in North America every other year
- Strong presence of signal processing community from which to draw attendance
- Appropriate conference venue (convention center or hotel(s))
- Meeting room capacity for two to three times your projected attendance
- Food & beverage service
- Consider the weather conditions (avoid hurricane season, etc)
- Attractive destination
- International airport within reasonable driving distance
- Safe visitor friendly area
- Visa requirements
- Variety of nearby hotels within a reasonable walking distance to the meeting venue
- Reliable public transportation
- Points of interest such as museums and landmarks within a reasonable distance
- Cost of goods and services in the area World City Rankings
- More detailed advice provided in the Site Selection section
Submit your Conference Information Proposal to IEEE

Submission of a Conference Information Proposal is required to initiate the setup of budgets, conference insurance and conference publishing. Submission of the IEEE Information Schedule also ensures that your conference will be listed in the IEEE ConferenceSearch and IEEE’s Call for Papers listing.

This form must be completed online IEEE Conference Information Schedule.

Select and Direct Conference Management Services

Guidelines for selecting a Conference Management Services

A Conference Management Services (CMS) is a common term to describe a professional conference organizer - a supplier providing meeting planning and meeting management services. Internationally they are sometimes called Professional Congress Organizers (PCO).

The term refers to companies that are specialized in the organization and management of workshops, conferences, seminars and similar events. CMS’s act as consultants to the organizing committee, enacting its decisions whilst providing full service management, including but not limited to conference design, registration, publication services, and booking, audiovisuals, IT support, logistics, travel and housing management, marketing, printing and web services, sourcing entertainment, financial management and budget control, research, etc.

Not all CMS’s are equal in expertise or capabilities. It may be necessary to work with two or more CMS’s to obtain the best results. For example, one CMS may have a particular expertise in China but not necessarily in publication services. It would be to the Conferences benefit to contract with the CMS for a Conference to be held in China but contract with a CMS who has the experience and capability to manage the publications.

It is crucial to a successful CMS relationship that the scope of the project is well defined at the onset or the relationship. However, it is equally important that both you and the CMS remain open to changes.

Successful CMS’s are defined as organizers who performed to the satisfaction of the Conference Organizer, meet all defined deadlines, and worked within the policies of IEEE – SPS. A CMS may be contracted for multiple Conferences for multiple years. However, after three (3) years of service an open Request for Proposal [RFP] must be issued to a minimum of five (5) CMS’s for future Conferences.

In 2009 the SPS Conference Board is launching an RFP for conference management services for all Signal Processing Society technical meetings. The Conference Board will provide Conference Organizers with a list of preapproved vetted CMS’s with whom they may contract.

For assistance with choosing conference management companies please contact the Conference Services Manager, Lisa Schwarzbek.

Obtain Sponsorship (Technical and Financial)

Signal Processing Society Bylaws for Sponsorship (Section 7, Conferences)

Types of Sponsorships Offered by IEEE Signal Processing Society:
Sponsorship relates to the responsibilities and accountabilities of an IEEE Signal Processing technical meeting or conference, with respect to financial, technical, publicity, and administrative aspects of a conference. Signal Processing can provide sponsorship to conferences that includes either financial involvement or non-financial involvement, ([IEEE P&P 10.1.2)](https://www.ieee.org/getstds/).  

**Financial Involvement:**

Sole Sponsor ([IEEE P&P 10.1.2])[1] indicates full & sole OU involvement.

Co-Sponsorship ([IEEE P&P 10.1.2])[1] indicates a shared involvement among several entities, one of which is an IEEE Operational Unit (OU).

Co-Sponsorships are between multiple IEEE OU's or one or more IEEE OU and an outside not-for-profit organization.

**No Financial Involvement:**

Technical Co-Sponsorship ([IEEE P&P 10.1.2])[1] indicates direct & substantial involvement by the OU solely in the organization of the technical Conference.

Cooperation ([IEEE P&P 10.1.2])[1] indicates limited involvement.

**Memorandum of Understanding (MOU)**

The relationship between sponsoring organizations must be explicitly defined in a Memorandum of understanding (MOU), ([IEEE P&P 10.1.5])[1]. For joint activities among Signal Processing Society and one or more IEEE OUs, an MOU is required. MOU Negotiations are required for Co-Sponsored Conferences (partnerships/spONSorship). We have provided useful information covering Contracts & Legal Documents [1] to assist you in planning your event.

**Conference Web Site**

Signal Processing Society conferences are strongly encouraged to publish a web site in support of the conference. The web site is often the primary communication with authors, reviewers, delegates, and guests. The web site should be attractive and user-friendly.

The development of the web site requires the cooperation of all Organizing Committee Chairs to provide information and ensure accuracy. However, to facilitate the interface between the Organizing Committee and the web site developer a single committee member should be assigned to this task. This person should be familiar with web design.

The Web site should include the following:

- IEEE Logo
- Signal Processing Society and co-sponsors’ logos
  
  Logos of non-sponsoring entities are forbidden.

- Conference Logo
- General Information
- Important Dates
- Plenary Speakers
- Technical Program
• Paper Search
• Special Sessions
• Tutorials
• Registration
• Accommodation
• Venue
• Banquet
• Welcome Reception
• Optional Tours
• General Tourist Information
• Visa Information
• Organizing Committee
• Technical Program Committee
• Travel Grant (if applicable)
• Call for Papers
• Paper Submission
• Show and Tell Call for Proposals

Conference Board

General Chairs Report to Conference Board

The Signal Processing Society Conference Board meets bi-annually in conjunction with the ICASSP and ICIP annual conferences.


The Conference Board may discuss the status of a Technical Meeting with regard to acceptance, closing and final reports.

Should there be a change to a policy or bylaw governing Conferences, the Conference Board will notify the General Chair.

ICASSP and ICIP General Chairs

In the case of ICASSP and ICIP, the General Chair serves on the Conference Board for the year prior, year of and year after their Conference.

Local Arrangements Chair

The Local Arrangements Chair should be a member of the Organizing Committee and may appoint various subcommittees, as necessary, to assist in effectively coordinating the implementation of conference plans at the local level. Subcommittees may be appointed to carry out responsibilities in the following areas:

• Meeting facilities
• Signage
• Audio/Visual Arrangements
• Committee Meeting Arrangements
• Operations and Message Center
Monitor Coordination
Communications
Hospitality and guest activities.
Function Planning
Social Program
Hotel Arrangements (including room assignments)
Airline and Rental Car Agreements
Security
Inspection trips and tours
Hotel Selection and Negotiations

In some cases, the hotel reservation and air-fare agreements are handled by a separate subcommittee for Hotel Reservations. The Conference CMS may provide assistance in the above functions.

**Noteworthy Duties** Noteworthy duties assigned to the Local Arrangements Chair and the chairs of the appointed subcommittees who assist him/her are:

- Coordinate with the local officers the preparation of all local arrangements.
- Secure the necessary clerical assistance and supplies needed for registration.
- Secure the services of individuals to help at the conference sessions, e.g., audio/visual operators, and hotel maintenance personnel.
- Make all arrangements involving entertainment, including guest programs, and obtain additional insurance coverage for tours.
- Organize space for meetings: room set-ups, acoustic insulation, audio/visual facilities, cost of rooms and equipment, storing of pre-conference material.
- Issue a schedule of preparatory activities, including deadlines for printing and distributing local publicity material.
- Contact local Convention Bureau for suggestions and assistance.

**Site Selection & Hotel Contracts**

This area should be dealt with six or seven years prior to an ICASSP, ICIP or ISBI conference or two or three years prior to another conference. For a site selection template contact the Conference Services Manager.

**Site Selection Guidance**

Some of the criteria for the selection of the conference site are:

- Easy accessibility to city, domestically & internationally
- How many airports are within a reasonable driving distance?
- How many flights daily at each airport? Are there enough to accommodate all your registrants and the other leisure travelers?
- What is the average airfare?
- What are the requirements for foreign travelers to come to this location?
- Meeting Room requirements & sleeping room needs
- Accessibility for people with disabilities ([What is ADA and how does it affect my Conference?](#))
- Meeting Space Guide
- Classroom Set up = 24 square feet/person or 2.2 square meters/person
- Banquet Set up = 12 square feet/person or 1.2 square meters/person
• Theater Set up = 9 square feet/person or 1 square meter/person
• Sleeping room guide
• For annual Conferences look at the number of rooms sold in the past two to three years. Add 10 – 20% to the nightly totals. This is a good method for a Conference that is seeing growth or is going to be held in a popular easily accessed location.
• For new Conferences assume that 100% of your projected registrants will require a sleeping room and add the staff requirement count. This is your “peak night” sleeping room requirement.
• IEEE – SPS typically blocks Run of House [ROH] sleeping rooms. Run of House mean different Room types offered by the hotel at the same price, depending on the availability at the time of check in any category of room can be offered to the guests.
• Availability of overflow hotels
• Appeal of local attractions/climate
• What events may be booked before, during or after?

**Meeting Facilities Subcommittee**

The Meeting Facilities Subcommittee Chair and assistants are responsible for ensuring the following arrangements:

- General conference space arrangements, including session, committee, luncheon, banquet and hospitality rooms and registration area.
- Registration facilities, including complete layout plans for registration (tables, chairs, telephone extensions, cash boxes, hotel facilities for overnight storage of registration materials.)
- Luncheon/dinner facilities, including arrangements for suitable decorations, preparation of menus and installation of a lectern and public address system for banquet speakers; if required, morning and afternoon breaks.
- Audio/visual support for technical sessions, including standardization of sizes of visual presentations, appropriate A/V equipment, projectionists and other follow-up activities. The qualities of the audio/visuals are directly related to the quality and the success of the conference.
- It is important to obtain references and recommendations from other users before selecting an audio/visual contractor. Most hotels have an on-premise A/V contractor that may be more expensive than an outside supplier, but offers the convenience of on-site staff and equipment. In some hotels, basic A/V, such as one microphone per session room, is complimentary. It is recommended that requirements for A/V, including room names and the time needed, be submitted to the contractor well before the conference. Each session room should be equipped with a podium, a table microphone for the Session Chair, a wireless lavaliere mike for the speaker (speakers have a tendency to wander away from a standing mike and leave their audience wondering what is being said), a pointer, an LCD projector and screen large enough for the room. You’re A/V suppliers should guarantee that spare projectors are available on site.
- Individual technical session requirements, including preparation of necessary signs for the sessions, arrangements for additional table and chairs for panel discussions, supply of audience question cards and individual arrangements for speakers (lapel microphones, light-weight rod or light pen pointers, etc.). These requirements should be coordinated with the Program Committee 4 to 6 weeks prior to conference.
Guard services (if required): Security is usually needed around the clock in the Exhibit Hall. One or two guards control access into the Exhibits Hall to registrants only, and guard the equipment therein after hours. Additional security should be contracted for the Registration Area after conference hours to ensure protection of the computer equipment in this area.

Post-conference clean-up, including return of all rented A/V equipment and approval and submission of all proper invoices for facility or services to Conference Treasurer.

Establish an on-call hotel contact during conference.

Message Center: An office, or operations center, must be arranged for on-site for the duration of the conference, and possibly, a day or two before the conference starts. Telephones must be installed, as well as copiers, computers, and workstations set up for the committee members who will staff the center. It should be stocked with all types of office supplies, sign making supplies, and sign holders, and be large enough to accommodate breakfast and lunch service for staff. The room should be locked in the evening. The Message Center must be centrally located and manned during the hours of the conference. A telephone line must be installed prior to the conference, and the number given to the switchboard operators in the hotel. The message board should be alphabetized, and the telephone message cards may be standard issue, or customized.

Communications: Telephones must be provided in the Operations Room, the Press Room, the Registration Desk, the Administrative Meeting rooms, and the Message Desk. At least a few phones should have outside lines (not connected to the switchboard). All lines in meeting and function rooms should be restricted to local usage. This must be arranged by the hotel. It is highly recommended that walkie-talkies and pagers be provided to key committee personnel, and to the convention service manager assigned to the conference. Walkie-talkies are extremely handy, and truly essential in a large facility, in that they eliminate the need to go through the hotel switchboard, which is often slow to answer and inefficient. The walkie-talkies are usually donated by a manufacturer of such equipment.

WLAN or Wi-Fi: Wireless LAN or Wi-Fi access should be made available were necessary. The areas where WLAN may be needed include the Operations Room, the Press Room, the Registration Desk, and some administrative meeting rooms. Access to the WLAN should be limited to business purposes only. Public access may be provided by a wireless service provider as a donation or for sale to registrants.

Billing System

The billing system decided upon should be useful to the hotel and the Organizing Committee alike. The committee must be very firm with the hotel regarding format for committee meeting food and beverage charges, authorized signatories, and terms and conditions for disputed items. A running record of all expenses will help considerably when reviewing the final bill.

For safety and convenience, the Registration Chair may wish to make daily cash deposits to the Master Account. This transaction should be coordinated through a Hotel Coordinator.

Hotel Space Assignment

Close coordination with other committees is required when assigning hotel space to different functions and sessions. The Registration Committee and the Program Committee must work with the Hotel Coordinator to analyze the expected session attendance for session rooms’ assignment. The hotel
coordinator must supply the hotel with layouts of room, allowing for aisles, access to exit, and standing room near the exit.

The Exhibits Hall must be assigned with traffic flow, security, and proximity to sessions in mind.

**Conference Logistics “Resume”**

A great aid in communicating with the hotel is a conference logistics resume. It is meant to provide the hotel with detailed information about conference logistics. It may be in loose-leaf form and have tabbed sections covering the following subjects:

- Key Conference Personnel
- Master Account and Billing Arrangements
- Background on the Conference, including statistics from prior conferences
- Copy of Advance Program from prior conference
- Food and Beverage, including menus, quantities, and schedules
- Meeting Rooms, including hourly and daily schedules of usage of rooms
- Audio/Visual Requirements for all rooms and functions
- Communications Requirements, including telephones, pagers, and walkie-talkies
- Security, including description of contracted security and key control arrangements

The information in this resume comes from the various other subcommittees. It is greatly appreciated by the hotel, and eliminates many potential problems later in the planning process. Any changes made to the resume must be communicated to the hotel. The hotel often converts the information into a resume of its own, using its own forms, and gives key people on the committee copies of it just prior to the conference.

The Hotel Coordinator should work with the Publicity Committee to ensure that pertinent information is aired on the hotel’s closed circuit TV at the appropriate time.

**Signage**

Signs are very important to traffic flow at the conference. Each committee must submit its requirements to this subcommittee, which, in turn, will work with the Publications Committee to produce graphically consistent and readable signs. The conference logo should appear on all signs. If arrows are used on signs, it is suggested that they be attached to the sign by using a Velcro strip; in this way a sign may be used in different locations, and the arrow attached to indicate the correct direction. Velcro arrows can also be used on the technical session signs. Table tent signs for the Luncheon or Banquet are also the responsibility of this committee.

Several large and prominently displayed signs of the session overview, and the floor plan of the hotel, are very useful to registrants, and may help to eliminate the most commonly asked questions.

It is sometimes difficult to assess Signage needs, particularly if those working on the requirements know the hotel well. Remember that most registrants are visiting the property for the first time, and are rather lost in their new surroundings. However, also remember that too many signs can be as confusing as too few.

Supplies should be kept on-site during the conference for last minute or overlooked signage needs. It is a must to have supplies to make signs at the conference in order to give directions or just to communicate in general to the registrants since most facilities do not have a means to audibly communicate throughout the facility.
Hospitality Subcommittee

The major responsibilities of the Hospitality Subcommittee are in the areas of coordinating hotel reservations, planning social functions and arranging for hospitality facilities. It is the responsibility of this subcommittee to make the arrangements for all food and beverage functions that take place during the conference, which may include:

- VIP Reception
- Welcome Reception
- Speakers’ Breakfasts
- Awards Luncheon or Banquet
- Coffee Breaks
- Off-Premise Social Events
- Banquet Speaker’s or Awards Reception
- Wrap-Up Session
- Workers’ Lunches

Hotel Reservations

The reservation of rooms for registrants may be delegated to a Hotel Reservations Subcommittee, or may be one of the primary responsibilities of the Chair of the Hospitality Subcommittee. Whoever is assigned reservations responsibility should arrange for a block of rooms in the conference headquarters hotel for the expected number of out-of-town registrants.

In addition, tentative overflow arrangements should be made and a procedure set up with the conference headquarters hotel for routing overflow reservation applications to other acceptable hotels.

Careful attention should be given to reservations for speakers and special guests and they should normally be housed in the host hotels. This careful attention should include direct contact with the speakers and special guests to ensure they make their reservations and are accommodated by the host hotel.

The responsible chair should be in attendance in the registration area during the conference in order to answer questions, cope with reservation emergencies and assist in the resolution of other logistical problems.

It should be pointed out that more and more cities provide a hotel reservation service either through the Chamber of Commerce, Convention and Visitors Bureau (CVB), or other organizations. In fact, quite often that is the only way that hotel will operate. It is very common for a hotel to require that a conference use Passkey®. Passkey is the travel industry’s leading online solution for group hotel reservations management and distribution.

Airline Special Fares

It is desirable to offer your meeting registrants, staff, committee, and participants the opportunity for reduced airfares. To make this happen, contact IEEE Travel Services about 9 months before your meeting. This early contract is necessary so the proper information can be placed with the registration information in the advanced program.

Conference organizers are not authorized to negotiate discounted airline contracts. Any individual who enters negotiation with an airline contract on behalf of the IEEE will violate the exclusivity of IEEE Travel Services agreements. These agreements have a much higher discount in place than individual can obtain. Therefore, it is recommended that you speak with IEEE Travel Services about reduced airfares.
Social Functions

The Hospitality Subcommittee Chair is primarily charged with the responsibility for coordinating any social functions which may be planned, i.e., securing entertainment and coordinating food arrangements with the Registration and the Meeting Facilities Subcommittees.

Luncheons and Banquets

The Hospitality Subcommittee should work with the Meeting Facilities Subcommittee and the hotel in arranging luncheon and banquet space and in the selection of menus. The Hospitality Subcommittee should also ensure that the following activities are performed:

Securing tickets for meals from hotel or arranging to have tickets printed. Tickets for each meal should be of different colors, dated, numbered and, if known, indicate room name for function.

In regard to scheduling authors' breakfasts or luncheons, the Committee should arrange for suitable facilities and meals and notify authors ahead of time by invitation letter. Such functions for authors can normally be used to check out the sequence of audio/visual presentations.

Negotiate necessary guarantees with hotel Banquet Manager for number of places to be set up for each meal. Caution should be taken against overestimating the number who will attend. Normally, Banquet Managers will set up for 10-15% more than the number guarantee. Therefore, guarantees should be on the conservative side, and the price of the tickets should exceed the cost of the meal by a reasonable margin of 20 – 25%. Any guarantee should contain an escape clause that stipulates that in case the number of registrants is less than estimated, only set-up charges will be incurred and not the full cost of the meal. It is in the interest of the conference to provide these guarantees for as late a date as is practical.

Inspection Trips and Tours

If the Organizing Committee decides to have inspection trips as part of the conference program, a competent individual - who is well-acquainted with local area sites that might be of interest - should be selected by the Local Arrangements Committee. The planned program for inspection trips should be submitted to the Organizing Committee for approval.

Guest Activities

Although not necessary, it may be beneficial to conference registrants to offer guest activities. This can be done in an informal or formal way.

Informal guest activities can be arranged by simply providing tour and sight-seeing activity information on the Conference web site. The guests would be on their own to secure tours or other activities.

Formal guest activities can be arranged by working with a Travel Agency, Convention and Visitor Bureau (CVB), or a Destination Management company. The guests would be provided a group discount supported by a number of registrations for the guest event. In other words, a tour of the local architecture may be offered at a discount to registrants guests, but the Conference would need to guarantee that a certain number of guests register for the tour.

In the past Conferences have offer formal guest activities because of the geographical location was such that registrants will want to bring their spouses and family. Plans for arranging a guest program for spouses or family should be made well in advance so that appropriate information concerning guest programs may be included in the Advance Program.

The Organizing Committee should decide if a guest registration fee for these special activities will be charged. All tours and social functions should be planned on a self-sustaining basis. A Spouses'
Hospitality Suite should be provided, and staffed during the hours of the conference. It is recommended that it be located away from the Registration and Technical Session area, but easy to find. The Suite should be stocked with maps, brochures on local attractions, and local magazines that list events taking place during the week of the conference.

A small gift item, or "goodie" bag with giveaway items from local merchants, is always well-received. Though a small number of people benefit from the services provided by the Hospitality Suite, it is worth the effort to have one for the goodwill it generates.

Tours for registrants and spouses should be arranged with the help of a local tour company. It is recommended that no more than one major tour be planned on each day of the conference. When more than one is planned, it is often difficult to meet the minimum guarantees required by the tour company. Pre Registration figures are unfortunately unreliable for the purpose of estimating tour participation; there are many no-shows, and many last minute sign-ups. Tours are not intended to make a profit, but should be priced 5% above costs to minimize liability. A break-even number of participants should be established which is well below the capacity of the tour bus. This allows an under subscribed tour to operate.

Prices for tours should be on a per head basis, versus a per busload basis. Cancellation and refund policy should be clearly stated and carefully reviewed. Insurance is necessary for all transportation and facilities, especially boats.

**Additional Insurance Coverage**

It is the responsibility of the Local Arrangements Committee to coordinate with the Finance Committee the securing of appropriate additional insurance coverage for inspection trips, tours or cruises. IEEE insurance does not normally cover these activities.

**Publication Sales**

It is the responsibility of the Local Arrangements Committee to assist the Publications Committee in arranging to receive and inventory copies of Conference Proceedings and to provide a suitable place for the sale and distribution of the Conference Proceedings during the conference. In addition, the Local Arrangements Committee should coordinate with the Publicity and Public Relations Committee the display of related technical materials of the sponsoring entities.

The attendee should pay for the record and mailing at the Registration Desk. The attendee should receive a ticket for one or both items, and turn in the ticket(s) at the Distribution/Shipping Desk.

**Exhibitions**

It is the responsibility of the Local Arrangements Committee to provide the necessary logistical support to the Exhibits Committee, if so required.

**Financial Reporting**

The responsible chairs must submit a complete financial accounting to the Conference Finance Chair of income and expenses for all functions, i.e., registration, luncheons and banquets, trips and tours, hospitality suites and local publicity. A complete detailed account of income and expenditures should be submitted to the Finance Committee within one month after the close of the conference.
Negotiating Contracts

After the completion of the site selection process, contracts must be written for the space required. Below are some key factors when negotiating a contract.

- Room rates
- Complimentary rooms
- Upgrades
- Staff rooms
- Meeting Space
- Exhibit Space Rental
- Parking
- Cancellation Clause
- Amenities
- Cut/off Date
- Telephone/Internet/Wireless Surcharge

Executing (Signing) Contracts

IEEE has standard “pre-approved” hotel contract templates with most major hotel chains [Hilton, Hyatt Regency, and Starwood]. We recommend using one of these templates when possible. These templates are U.S. based and may not be acceptable to a hotel outside of North America. However, they do include the required IEEE clauses that all negotiations must include. The contract template can be found online under the heading IEEE Hotel Contract Templates and Legal Documents.

Once you have a contract that you and the hotel have agreed you must send it to the Conference Services Manager [CSM] to begin the IEEE-SPS review process. Contracts should be sent via e-mail to sps.conference@ieee.org and l.schwarzbek@ieee.org.

All contracts require written approval from the General Chair. The written approval must state that they have read and agree with the terms defined in the contract. An e-mail message with the contract file(s) will suffice.

The Conference Services Manager will check the contract for the following:

- Comparable room rates to prior similar Conferences
- Four Required IEEE contract clauses: (1) mutual force majeure, (2) mutual indemnification, (3) insurance and (4) cancellation
- Clearly defined room block requirements
- Deposit structure and requests
- Rate protection
- Concessions such as staff rates, complimentary upgrades, and complimentary rooms based upon number of rooms sold, etc.
- IEEE policy compliance

*If a hotel is unable or unwilling to agree to one or more of the required IEEE contract clauses we must provide written documentation that (1) the clauses were requested and refused, (2) that the Conference organizer is willing to proceed without this clause, and (3) that the Executive Director is willing to proceed with this clause. This is a typical situation with hotels outside of North America.

PLEASE NOTE: Contracts Valued over $25K must be forwarded to IEEE - SPS for review & execution. All others will be reviewed upon request.

If there are some questions or concerns, the CSM will contact you and, if you desire, the hotel to talk about them. A hotel contract will be reviewed by the CSM within two (2) business days. If additional negotiations or discussions are required the process could take a week or longer. Under some
circumstances such as business travel, vacation or holiday time out of the office or the number of contracts in the cue, the CSM may request additional time for the review.

Once all questions have been resolved the CSM will complete the contract checklist, contract tracking forms, written approvals as needed, written clause refusals if needed and, additional support materials to send the contract to IEEE Contract Administration.

Once the contract has been sent to Contract Administration one of two things could happen. One the contract could be approved as is and forwarded on for signature. If this should occur, the CSM will notify you that the contract has been approved.

The second possibility is if Contract Administrator has further concerns and/or requires more documentation. If this should occur the CSM will work with you and/or the hotel to satisfy the Contract Administrator’s concerns.

A hotel contract can take 1 – 2 weeks to get through the Contract Administration process. In total a contract can take 10 to 20 business days to process.

Contracts & Legal Documents can be found online.

**Emergency Plan**

*Do you know what to do in the event of an emergency?*

Conference Organizers are encouraged to consider all possible scenarios when planning their conference, including possible emergency situations.

Examples of recent incidents include:

- Exhibitor/Attendee has an accident at a conference
- Attendee disrupts a conference with abnormal or violent behaviors
- Natural disaster occurs during a conference or a meeting
- Volunteer’s family member gets sick or dies while at a meeting
- Legal action is taken just prior to a conference, effectively closing the conference
- Act of terrorism in the host city.

Your plan should include emergency contact information and a back-up plan if telephone and e-mail communications are unavailable.

As part of your ongoing conference organizing, be sure to develop an emergency plan. This plan should include, at minimum:

- Identification of location for onsite command center
- Identification of vulnerabilities, different levels of emergencies and response to each
- Host facilities’ emergency plans
- Plan to disseminate information, exhibitors, volunteers and registrants.

**Technical Program Chair**

The Technical Program Chair is responsible for the organization and coordination of the Conference content and logistics. The Technical Program Chair may select as members of the Technical Program Committee persons to represent different areas within the domain of the Conference. The Chair may also appoint Vice-Chairs with responsibility to various aspects of the Program such as contributed papers, invited papers, tutorials, workshops, liaison to other committees, and representative of co-sponsoring or participating entities.
Key Responsibilities:

- Prepare the Call for Papers
- Receive and track submitted papers
- Review papers for presentation
- Select papers to be presented
- Organize sessions and select Session Chairs
- Conference Program
- Paper Selection
- Correspond with authors on acceptance rejection
- Determine content of authors kits, including page limits
- Make room assignments with Local Arrangements Committee
- Work with Publications Committee on Advance Conference
- Work with Publications Committee on Conference Proceedings
- Provide instructions to speakers and Session Chairs
- Work with Publicity Committee on key content of Conference for publicity
- Work with Exhibits Committee to coordinate exhibits with Conference content
- Provide last minute instructions to speakers and Session Chairs at Speakers' Breakfast

**Call for Papers**

In general the types of papers for a Conference may be defined as "open call", "solicited" or "stimulated", and "invited". These terms may be defined by the following:

**Open Call**

Open Call papers are received by the Technical Program Committee in response to a Call for Papers open forums such as SPS Magazine, IEEE Web site, or SPS Journal advertisement. These papers are reviewed by the Technical Program Committee for acceptance, if appropriate.

**Solicited**

Solicited or stimulated papers are those that result from requests by Technical Program Committee members to groups or individuals working in particular areas of interest.

Both of the above are important to a high-quality conference and each serves a special need. Open call papers are very important to the overall quality of the conference. The proper professional review of the papers (or extended summaries) as to quality of contents and level of preparedness is critical to the quality of a conference. In soliciting all types of papers, as much information should be elicited that will make such a thorough review feasible.

**Invited**

Invited papers are those specifically requested from well-known authorities by the Technical Program Chair. These may or may not be reviewed by the Technical Program Chair.

The invited papers and solicited papers are very important, especially to the presentation of new, unusual, or highly specialized topics. In most instances, however, invited papers should be held to a minimum, while a significant number of solicited or stimulated papers may be used as "seed papers" in several of the sessions that can then be filled out with open call papers.

The Technical Program Committee will decide, subject to the approval of the Organizing Committee, whether or not papers will be invited or secured through a Call for Papers, or both.
If a Call for Papers is issued, the Committee should work with the Publication and Publicity and Public Relations Committees in printing and mailing the Call for Papers and furnishing appropriate publicity information to IEEE publications.

If invited or solicited papers are to be used, the Committee should:

- Make a list of specific topics, in program format, with possible titles of invited papers or sessions.
- Write to those who may be qualified to present the suggested papers requesting their participation. The letter should also furnish information concerning the expected length of the paper, type of illustrative material or special audio/visual equipment that might be available. A copy of the proposed program, if available, should be enclosed.
- Write those who may be qualified to organize sessions on a specific topic or who may be stimulated into submitting solicited papers on such topics. The letter should specify the nature of the session and the desired number of papers in the topic.

**Organize Sessions and Selects Session Chairs**

The Committee will schedule sessions and select subjects, speakers, Session Chair, moderators and contributors to discussions.

In this regard, the Technical Program Committee may schedule a Mini theme which is a set of sessions on a particular topic that cover all the time slots available for sessions during the Conference. This gives the Conference registrants the opportunity of attending only the identified Mini theme sessions. Special consideration should therefore be given to the Mini theme topics and to the advertising of the Mini themes. The Mini themes are more of a grouping of sessions for publicity purposes than the basis for program organization and are to be identified after the sessions are planned.

The sessions may be comprised of panel discussions or papers. The panel sessions generally should include a Chair and three or four panelists. The format for these sessions is very flexible and is generally determined by the Session Organizer or Chair.

The paper sessions should ideally include the presentation of a number of papers and a question-and-answer period for each speaker.

**Conference Program**

The Technical Program Chair will arrange the program in final detail and prepare a draft of the printed program for the Publications Committee.

**Paper Selection**

Signal Processing Society does not accept papers based upon abstracts or summaries. The entire paper must be reviewed before it can be accepted.

The deadline for abstracts or summaries of papers should be set sufficiently far in advance of the date of the conference to allow enough time for proper review. A schedule showing dates for the different tasks, deadlines, and dependencies should be established to help all Technical Program Committee members as well as authors.

All deadline dates relating to the paper process should use the IEEE Standard Format, *(IEEE Policy 9.23)*

<table>
<thead>
<tr>
<th>FORMAT</th>
<th>SAMPLE</th>
</tr>
</thead>
</table>

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E-mail

Formal Correspondence

Computer Applications

If the committee decides to include a specific time along with the deadline date, this should be U.S. Eastern time and identified as such.

**Author Notification**

Authors who have submitted abstracts should be notified whether they have been accepted or rejected. Authors whose papers have been accepted should be given the specific deadline for the final copy and limitations to paper length, if any.

**Release Forms**

If a conference Proceeding will be printed, detailed preparation instructions, copyright release forms and author kits should be mailed to all authors. Author kits are available from IEEE at a nominal charge and should be requested through SPS staff.

**Paper Withdrawals**

The IEEE strongly discourages changes and, in particular, withdrawals of papers once submitted and included in the program. To avoid the likelihood of this, the author is strongly encouraged to get all necessary company and/or government approvals prior to submitting his/her paper to the conference. If under any circumstances it becomes necessary for the author to withdraw or change a paper, IEEE policy dictates that the request to do this must come directly from the author and not from any third party. IEEE policy also states that in this case, the author will be held liable for all costs that are incurred. It would then be up to the author to get reimbursed for the expense from any third party if he/she feels it is justified. The IEEE cannot act as a policing entity on behalf of the author in this regard.

**Conference Proceedings**

When a Conference Proceeding publication is planned, the Program Committee should prepare a clear and realistic schedule, which will allow ample time for the writing, review, correction, and printing of the Proceeding. Coordination with the Publications Committee is imperative.

**Paper Presentation**

Prior to the presentation of their papers, authors should be contacted to insure that they will be present at the conference and that proper audio/visual facilities will be available. Please refer to policy 7.11 for guidance on how to handle the papers of authors who do not present.

**Review Visuals**

An effort should be made to review visuals prior to presentation to ensure that they can be seen by the audience. Many conferences require two copies of visuals. With sufficient lead time to allow for all necessary reservations, the Program Committee should inform an author of all pertinent details which will be required; i.e., location, time, duration of presentation, special author arrangements, etc. In order to work toward a quality meeting and especially to help first time and non-native English speaking authors, it is suggested that a practice room be set up at the meeting. This will also allow the proper loading of files onto a computer. Special arrangements may be required for foreign speakers to assure quality documentation, presentation, and communications of questions/answers.
Confidentiality

IEEE Policy and professional ethics requires that referees treat the contents of papers under review as privileged information not to be disclosed to others before publication. It is expected that no one with access to a paper under review will make any inappropriate use of the special knowledge which that access may provide. Contents of abstracts submitted to conference program committees should be regarded as privileged as well, and handled in the same manner. The Conference Publications Chair shall ensure that referees adhere to this practice.

Oral Presentation

Organizers of IEEE conferences are expected to provide an appropriate forum for the oral presentation and discussion of all accepted papers. An author, in offering a paper for presentation at an IEEE conference, or accepting an invitation to present a paper, is expected to be present at the meeting to deliver the paper. In the event that circumstances unknown at the time of submission of a paper preclude its presentation by an author, the program chair should be informed on time, and appropriate actions must be taken. IMPORTANT: Please read the Technical Meeting No-Show policy below.

In some cases it may help reduce no-shows for the Conference to require advance registration together with the submission of the final manuscript.

Quality of Visuals

The Program Committee has the responsibility of communicating to the author’s guidelines on the quality of visuals used when presenting the papers. These guidelines should include information on the type of background (dark letters on white background), the number of lines on a slide or viewgraph (four or five), the point size of the letters used for best visibility. Of course, the size depends on the size of room used during the presentation; larger type is needed for plenary lectures with a large audience (several hundred).

Timetable for Program Committee

The Technical Program Committee has a considerable number of activities for which it is either solely or jointly responsible. These activities need to be spread out over at least one year to ensure the proper coordination among its members and a strong program.

<table>
<thead>
<tr>
<th>Time Needed</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>12-15 months</td>
<td>Technical Program Committee membership is complete and Technical Program Committee meets to agree on themes, format, and type of papers. Call for Papers is finalized and is provided to the Publication and Publicity Committees for printing and distribution. Candidates for solicited sessions and invited papers are identified.</td>
</tr>
<tr>
<td>9-11 months</td>
<td>Papers and sessions proposals arrive for review by the PC. Additional solicitations are made as appropriate.</td>
</tr>
<tr>
<td>6-9 months</td>
<td>Papers and session proposals reviewed by the PC.</td>
</tr>
<tr>
<td>5-6 months</td>
<td>Paper review is completed and program is finalized. Papers are arranged into sessions. Collection of IEEE copyright forms.</td>
</tr>
<tr>
<td>4-6 months</td>
<td>Speakers and Session Chairs are notified of acceptance or rejection. Authors’ kits/instructions are mailed to authors if appropriate. Program details are provided to Publication Committee for printing the Advance Program.</td>
</tr>
<tr>
<td>Time Needed</td>
<td>Activity</td>
</tr>
<tr>
<td>-------------</td>
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</tr>
<tr>
<td>3-4 months</td>
<td>Camera ready/electronic papers are due at the printer. Technical Program Committee members contact late authors.</td>
</tr>
<tr>
<td>2-3 months</td>
<td>Technical Program Committee contacts Local Arrangement Committee to determine room assignments for the different sessions, location and arrangement for the Speakers' Breakfast if appropriate, etc.</td>
</tr>
<tr>
<td>1-2 months</td>
<td>Technical Program Committee Chair contacts Session Chairs for detailed instructions about the presentations.</td>
</tr>
<tr>
<td>0 months</td>
<td>Provide last minute instructions to speakers and chairs during the conference.</td>
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</tbody>
</table>

**Paper Review Process**

The paper review process is probably the most important part of developing a strong Program. It varies depending on the specific conference and may include the review of solicited and invited papers as well.

Signal Processing Society conferences perform blind reviews to allow concentration on content and to prevent preferential treatment of colleagues.

SPS review process is typically performed by a third party vendor.

The process can be summarized by the following steps that:

- PDF files are submitted by authors.
- The submitted PDF files are examined page-by-page by vendor's staff to determine:
  - The title on the PDF matches the title typed into the web form.
  - Use of fonts in the PDF meets the IEEE Xplore requirements.
- The author list on the PDF matches the author list typed into the web form.
- The page limit is maintained.
- The required format (2-column, etc.) is followed.
- If a list of prohibited authors is received from IEEE, the vendor who is coordinating the papers submission scan for those names in the database, after the submission deadline has passed (so we have a complete list) --- At this point, the papers enter the online review system available to Technical Program Chairs and track chairs (if any) ---
  - It is important to perform blind reviews; therefore the papers distributed to the reviewer can not contain any information about the authors.
- The program committee assigns the papers to available reviewers via one of two methods:
  - Manual, direct assignment based.
  - Semi-automatic assignment based on mutual agreement between the author-specified topic and the reviewer-specified preferences
- Each paper is classified into topic groups based upon the Technical Program sessions as defined by the Technical Program Committee.
  - The Technical Program Committee must regularly review the classification of papers to ensure that they are being properly classified.
- Assignment of most logical reviewers by the Technical Program Committee officers or members based upon subject matter expertise.
  - Reviewers are selected by the Technical Program Committee.
It is ideal to have at least three (3) reviews per paper. Some committees assign more reviewers than this, expecting some shortfall, while others assign only three and are very diligent in making sure those three reviewers submit reviews.

The papers are distributed to the reviewers via an online system.

Reviewers must actively sign-in and retrieve papers assigned to them and then must fill out a questionnaire in reference to the paper. The reviewers rate the paper on several aspects including originality, quality of references, correctness, the reviewer's confidence in the review, etc. Reviewers may also provide comments to the authors, and separately, comments to the program committee (which are not given to the authors.)

The full review data is made available to the program committee through the online interface and can be downloaded in bulk format for easy off-line analysis.

The vendor must take care to inform the program chairs if there are any papers with insufficient reviewers assigned or insufficient reviews submitted. Program Chairs must be diligent to ensure a quality technical program.

A paper should not get through the review process and been accepted without having been looked at by at least 5 persons and read through completely by at least 3 persons.

Constant updated reports from the Technical Program Committee to all reviewers on the status of papers in the review process including statements of acceptance or rejection by the reviewers.

Close work on session plans by the Technical Program Committee officers and Technical Program Committee members to slot as many high-quality papers as possible in the conference.

--- END of review process ---

Notification by the Technical Program Committee Chair to the authors of acceptance or rejection of papers.

The status reports to reviewers should identify the reviewers of each paper, its present status (accepted/rejected), and any comments regarding the paper's quality or referral to another reviewer.

Copyright forms for all accepted papers forwarded to SPS Staff.

Remove all rejected papers from the Conference Proceedings data.

After selection of the accepted papers, many conferences allow authors to make small revisions to their papers, with the restriction that the title and author list must not
change and that any revisions must be minor and not change the overall results of the reviewed paper.

- Any revised papers that are uploaded go through the vendor inspection again to ensure quality of the data. This data can be used to produce the printed program guide, the proceedings table of contents and author index, and the web-based paper listings.

**Paper Review Criteria**

The Technical Program Committee must review each paper for the following criteria.

- Formatted to IEEE standards
- Copyright release form accompanying the submission paperwork
- Original works that have not been published or submitted for consideration elsewhere
- Author has been authenticated and assure that the paper has not been computer generated
- Relevant to topic(s) for the conference
- Quality writing
- Quality science

**Conference Proceedings**

The Conference Proceedings is the publication of papers presented at the Conference. A Conference may require that papers missing the publication deadline for the Proceedings cannot be presented at the Conference. In such a case the Technical Program Committee collectively has a major responsibility of ensuring that all selected papers meet the printer's deadline with camera-ready copies and IEEE copyright release forms.

The Technical Program Committee should work with the authors to ensure that corporate clearance by their employers can be provided on a timely basis. All papers submitted to the Technical Program Committee for review should already have corporate clearance, but this is often a problem for invited papers that are submitted to the Technical Program Committee late in the review process.

The Technical Program Committee Chair then has the responsibility of notifying the authors as soon as possible of paper acceptance. An Author's Kit should be furnished to each author along with additional instructions for preparing the camera-ready/electronic copy and an IEEE copyright release form. The Authors' Kits or instructions are generally mailed/e-mailed to the authors directly based on the mailing information generated by the Technical Program Committee Chair.

The Technical Program Committee should work with the authors to ensure that the IEEE copyright release forms do not pose a barrier to publishing papers. This can cause significant delay if it is not handled properly.

**Technical Meeting No-Shows**

*(Policy endorsed April 2009, pending approval)*

The technical meeting organizers will be responsible for gathering the no-show information from the sessions and submitting the information to the Conference Executive Office staff.

**No-Show Paper Publication and Archive**

*(Policy endorsed April 2009, pending approval)*

No-Show papers are defined as papers submitted by authors who subsequently did not either themselves or via proxy present the paper at the technical meeting. No show papers that were not
withdrawn and were published in the Proceedings must be identified as “No-Show” in the files submitted to IEEE for further publication (Xplore). No-Show papers will not be available on Xplore or other public access IEEE forums. IEEE will maintain an archive of no-show papers.

Authors of no-show papers must be advised in writing that IEEE reserves the right to exclude a paper from distribution after the conference (e.g., removal from IEEE Xplore) if the paper is not presented at the technical meeting.

**Work with the Local Arrangements Committee**

The Technical Program Committee should be actively involved with the Local Arrangements Committee and the details of local Conference considerations. This involvement, of course, is based upon the session plans of the Conference.

The Technical Program Committee should communicate to the Local Arrangements Committee their needs for the Conference, including Committee meeting rooms and special meetings’ requirements. The Technical Program Committee Officers should work with the Local Arrangements Committee to select the proper room sizes and location for the sessions. Some information regarding anticipated session attendance may be gained from registration forms. The Technical Program Committee Chair should review the proposed session topics in view of previous conference attendance in similar sessions to be sure that the more popular sessions will be slotted in the larger session rooms. Also, the scheduling of sessions should be based upon minimizing conflicts of sessions on the same topic.

The Technical Program Committee Chair should work with the Local Arrangements Committee and the Session Chairs to identify the audio/visual equipment requirements for each session. Some presentations may also require easels, audio recorders, and television monitors with video recorders. These requirements should be communicated to the Local Arrangements Committee.

The Technical Program Committee Chair should communicate the detailed information about presentations directly to the Session Chairs.

Also, the details of the Speaker’s Breakfast and the training of Audio Visual operators should be reviewed by the Technical Program Committee Chair working with the Local Arrangements Committee. An important point regarding the Speaker’s Breakfast is that sufficient tables be set to allow each Session Chair to sit with their Speakers.

Feedback on presentations is always important. The Technical Program Committee Chair should therefore arrange with the Local Arrangements Committee to have session evaluation forms distributed to the registrants in each session.

**Work with the Publicity Committee**

The PC's major publicity requirement is the distribution of the Call for Papers. The Technical Program Committee Chair should work with the Publicity Chair to define a plan within budget limitations that will give maximum publicity to this document in a timely fashion.

In addition, the Technical Program Committee Officers should later develop summary information about topics, tutorials, Mini-themes, special speakers, etc. for use by the Publicity Committee to advertise the Conference. Based upon the anticipated program content, the Technical Program Committee Chair may also want to recommend that publicity be provided in specific publications.

**Work with the Publications Committee**

The Technical Program Committee generally works with the Publications Committee to prepare the printed material for the Call for Papers, the Advance and Final Programs, Conference Proceedings, and
other publications. Also, the coordination of the Author's Kit material should involve the Publications Committee. A key consideration in all of these activities is the coordination of schedules to meet the printers’ deadlines and obtaining the IEEE Catalog, ISBN, and Library of Congress numbers from IEEE.

**Work with the Exhibits Committee**

The Technical Program Committee may be helpful to the Exhibits Committee in securing exhibitors for the Conference. The Technical Program Committee Chair should periodically provide lists of the authors' company affiliations to the Exhibits Committee for contact regarding exhibits or participation.

Also, the topics addressed by the programs may be used by the Exhibits Committee to encourage participation by certain companies associated with the particular topics. Lists of tutorial and session subjects therefore should be forwarded to the Exhibits Committee.

**Work with the Finance Committee**

The Technical Program Committee Chair needs to work closely with the Finance Chair for the budget items assigned to the PC. These items tend to vary from conference to conference but may include any of the following:

- printing and distribution of Call for Papers
- printing and mailing of Authors' Kits
- expenditures for refreshments at Technical Program Committee meetings
- miscellaneous telephone, stationery and postage expense
- tutorial honorarium expenses, if appropriate
- expenses for Speakers' Breakfasts

If these items are not in the Technical Program Committee budget, the Technical Program Committee Chair needs to work directly with the appropriate Committees to estimate, manage, and monitor the costs associated with them.

**Work With the Registration Committee**

The Technical Program Committee Chair should work with the Registration Committee on any problems arising from the registration of program participants. In particular, the Technical Program Committee Chair should ensure that all Chairs and Speakers are aware of their need to register for the Conference.

A basic ground rule is that all participants must register for the Conference.

The Technical Program Committee Chair should identify Session Chairs and Speakers to the Registration Committee, so that the appropriate badges or ribbons for identification may be included in their registration packets. These people are critical to the quality of the Conference and therefore may be recognized by the use of ribbons or special badges during the Conference.

The database of the program participants should be used by the Registration Committee to simplify the registration process.

**Publications Chair**

The Publications Chair is responsible for the coordination of the publications necessary to the conference.

**Key Responsibilities:**

- Conference Logo, Letterhead and Envelopes
- Call for Papers
There are many resources available to you to assist with your Conference Publication development, preparation and production. You may also choose to work with the conference management company.

Online Resource Center for Conference Publication Organizers

**Logo, Letterhead and Envelopes**

One of the first assignments of the Publications Committee is the design and production of the conference logo and letterhead. At the top of the page are the conference logo and the IEEE logo, the full and abbreviated conference name, dates, location, and hotel. The left side of the page should list the committee functions, respective chairman names and telephone numbers, in a type size that is readable. Please note that letterhead with such information can quickly become outdated, and it is recommended that letterhead be printed in several small quantities with changes made when necessary.

**Call for Papers**

The Publications Committee works with the Technical Program Committee and the Publicity Committee to design and disseminate the Call for Papers.

**Author Kits**

The Author Kit is an online resource for authors who have had their paper accepted. An invitation to the online resource may also serve as notification to the author of acceptance of a paper. They are comprised of many documents and forms, which come from various sources. They usually include:

- Acceptance Letter, personalized to each author with title and number of paper, written by the Technical Program Chair; one letter per accepted paper
- Conference and Hotel Registration Link
- Reprint Order Form
- Over-length Page Form
- Author Kit Acknowledgment/Audio Visual Requirement Form
- Speakers’ Breakfast Form
- Location for downloading information and forms (e.g. paper format, Advance Program, Registration Forms, etc.)
- Sample of point sizes for visuals

The Program Chair usually generates the e-mailing address list for sending the link to the Author Kit online resource. Standard IEEE author kit forms are available by contacting SPS Staff.
Conference Program

The Conference Program and other printed materials required at the conference are also the responsibility of the Publications Committee. Some of these materials will be described below.

Final Program

The Final Program is an update of the Advance Program. The registration form, the hotel reservation form, and the airline reservation information may no longer be needed, and therefore, deleted. Information such as session room names and numbers, spouses' hospitality information, and any changes in schedules and locations must be added. Changes in paper titles or author information on final manuscripts will also be noted and corrected in the Final Program.

Advance Program

The Publications Committee is responsible for collecting from various other Committees all the front matter for the Advance Program. The front matter consists of the following elements:

- Cover Art
- General Chair's Message
- Program Chair's Message
- Listing of Organizing Committee Chairs and members
- Conference Sponsor Listing
- Information on:
  - Conference city, including map
  - Conference hotel and hotel reservation form
  - Transportation
  - Conference Arrangements
  - Conference Proceedings Distribution and Return Mailing to Attendee
  - Exhibits
  - Tours
  - Banquet, Luncheons, Receptions and other Social Events
  - Complete Conference Registration information and form
  - Listing of Sessions
  - Session Overview
  - Photos

The contributing committees are expected to submit their material to the Publications Chair in a timely fashion.

The size of the print run for the Advance Program is determined by the committee depending on the size of the mailing list. The printing and mailing of the Advance Program may be handled by the IEEE Service Center for IEEE sponsored and co-sponsored conferences. The IEEE mailing indicia is used to take advantage of the reduced mailing rates the government grants not-for-profit institutions. It is very important to note that the indicia are non-transferable, at any time or for any conference.

Conference Proceedings

Approximately 12 months prior to the conference, the Chair of the Publications Committee - or a designated member of the committee - should complete the "Conference Publication Form" (Section 16). This insures that post-conference sales will be handled by IEEE and establishes a payment schedule to the conference. In addition, it results in assignment of required identification numbers for
the publication (Required Identification Numbers). Copies of this form may be obtained from IEEE Signal Processing Society Staff or IEEE TAB Products-Conference Proceedings.

**Proceedings Production Process and Guidelines**

The production process of the conference proceedings involves steps in addition to the actual printing of the proceedings. Some of these steps include:

- Preparation of papers
- Production costs
- IEEE required number assignments
- IEEE catalog number
- Library of congress number
- ISBN
- ISSN
- Copyright requirements
- Clearance of papers
- Publication requests (outside organizations)
- Book proposals from outside organizations

An important product of any IEEE sponsored conference is the publication of the conference proceedings. The IEEE Conference Publication Program purchases proceedings from meetings in which an IEEE OU (Society/Council, Chapter, Region, Section and/or Board) is involved. (The level of involvement need not be financial; cooperation and technical co-sponsorship are also acceptable conditions for inclusion in the Conference Publication Program.) The Conference Publication handles post-conference sales of these proceedings through its Order Plans (subscription packages) and Single Sales programs. Organizing Committees should contact the IEEE TAB Products-Conference Proceedings office early in the planning cycle, so that the Conference Publication can, through this office, indicate the number of proceedings required for post-conference sales.

IEEE policy requires that all inquiries regarding publication by an agency outside of IEEE of papers presented at any meeting shall be directed to the IEEE Copyrights Manager and no representative of an IEEE Organizational Unit(s) is authorized to grant such permission. (IEEE Policy and Procedures 6.3.1.)

**Production of Conference Proceedings**

The production process of the conference proceedings involves the following steps, in addition to the actual printing of the proceedings:

- Acquisition of IEEE catalog number, Library of Congress number, ISBN and ISSN
- Determination of quantity of proceedings for IEEE purchase
- Determination of print run
- Collection of IEEE Copyright forms
- Collection of over length page charges
- Collection of all reprint orders
- Collection of speakers' forms (if used)
- Collection of all audio/visual requirements
- Preparation of "Reverse of Title Page"
- Preparation of final technical program
- Preparation of author index
• Pagination, and insertion of copyright lines and running feet
• Delivery of proceedings to the conference site one week prior to conference/Coordination with the conference hotel
• Delivery of proceedings to IEEE as soon as they have been produced

**Preparation of Papers** It is the responsibility of the Publications Committee to coordinate the preparation of papers to be published in the conference proceedings with the Technical Program Committee. The Technical Program Committee should normally arrange for the papers to be submitted in final form on forms or mats suitable for printing before the papers are given to the Publications Committee. If a conference proceeding will be printed, detailed preparation instructions and author kits should be mailed to all authors.

For conference publications to which IEEE owns the copyright, prospective authors must be provided with an IEEE Copyright Form with appropriate instructions for its completion. IEEE Copyright Forms are available upon request through IEEE TAB Products-Conference Proceedings, IEEE Conference Services and the IEEE Copyrights Office. A follow-up should be made to insure that papers and Copyright Forms are received by a predetermined date.

The securing of a signed IEEE Copyright Form for each paper satisfies the responsibilities of the Publishing Committee. It is the responsibility of each individual author to insure that proper company and/or government clearance is obtained, if such is required. Any material bearing company or government security classification should not be considered for publication.

**Production Costs**

The Publications Committee will keep the Conference Chair and Treasurer informed of all production costs relating to the publication of the conference proceedings. The conference should pay for all production costs related to the publication of the proceedings, unless the sponsoring IEEE Organizational Unit has agreed to absorb these costs. The IEEE Conference Publication program may reimburse the conference for the copies it acquires.

**IEEE Required Number Assignments**

There are several identifying numbers that are essential to the conference publication. These numbers are the IEEE Catalog Number, the Library of Congress number, the International Standard Book Numbers (ISBN) and (if applicable) the International Standard Serials Number (ISSN). The Publications Committee will ensure that all necessary numbers are obtained and that these numbers are shown in the appropriate places in the publication. Further information on each number and its specific placement is given in **Placement of Required Numbers** paragraph.

**Copyright Requirements**

In order to fulfill IEEE copyright requirements, the Publications Committee will ensure that a signed IEEE Copyright Form is obtained for each paper to be published in a conference proceeding. In addition, all IEEE copyrighted proceedings must have an IEEE copyright statement printed on the reverse of the title page (IEEE Copyright Statement; current IEEE Copyright Form.)

The Conference Publications Committee is responsible for adding the Copyright Clearance Center (CCC) code and the copyright notice at the bottom of the first page of each paper to be included in the conference proceedings. The CCC code is constructed as follows: ISBN/year/CCC fee. For example, the following code designates any of the papers appearing in the proceedings of a 2004 conference publication, where the ISBN is 0-1234-5678-9 and the CCC fee is $20.00.0-1234-5678-9/04/$20.00.

If the author has signed Part A of the IEEE Copyright Form, the following IEEE copyright notice must appear after the CCC code: © 20xx IEEE. For example:
If the author is (or ALL authors are) employed by the U.S. Government, then Part B must be signed and the following notice must appear instead of the CCC code and the IEEE copyright notice: U.S. Government Work Not Protected By U.S. Copyright.

If the author is (or ALL authors are) employed by a Crown government (i.e., British, Canadian, Australian, etc.), then Part C must be signed and the following notice must appear instead of the IEEE copyright notice:

©20xx Canadian [or British, etc.] Crown Copyright

The CCC code should precede the Crown Copyright line:

0-1234-5678-9/04/$20.00 © 2004 British Crown Copyright.

**Clearance of Papers**

The IEEE must of necessity assume that material presented at its meetings or submitted to its publications is properly available for general dissemination to the audiences these activities are organized to serve. It is the responsibility of the authors, not the IEEE, to determine whether disclosure of their material requires the prior consent of other parties and, if so, to obtain it. In order to ensure that the authors are aware of their responsibilities, signed [IEEE Copyright Forms](#) must be collected for all papers accepted for publication.


**Publication Requests - Outside Organizations**

All inquiries from outside organizations concerning the post-conference republication of selected and/or expanded papers presented at and published in the proceedings of any IEEE conference should be directed to the [IEEE Copyright Office](#).

**Book Proposals from Outside Organizations**

In the event that a commercial or non-IEEE publisher approaches the Publications Committee or Publications Chair with a proposal to publish a book of selected and/or expanded conference papers, the [IEEE Copyright Office](#) must be consulted.

**Sales Distribution of Conference Proceedings**

**Pricing** There are two types of prices that should be considered for the conference proceedings. These are the conference "on site" sale price and the "post-conference" sale price. Since these two prices will normally differ, there should be no price indication printed or shown on the conference proceedings. In addition, IEEE policy requires that IEEE members receive a discount from the price charged to non-members.

The Publications Committee, in coordination with the Organizing Committee and the Conference Board, will determine whether the conference proceedings will be included in the registration fee or will be sold separately at the conference.

Conference "On Site" Sale Price - It is the responsibility of the Publications Committee, in conjunction with the Organizing Committee and the sponsoring organizations, to establish a price for the sale of the conference proceedings at the conference site.
"Post-Conference" Sales Price - IEEE TAB Products-Conference Proceedings will determine the post-conference sale price of the conference proceedings. This price will be based on recommendations of the TAB Conference Publications Committee. IEEE TAB Products-Conference Proceedings should be contacted for the current pricing guidelines.

Post-Conference Sales Distribution - Conference Publication Program

The Conference Publication Program handles post-conference sales of proceedings from meetings sponsored and co-sponsored (either financially or technically) by IEEE Organizational Unit (Society/Council, Chapter, Region, Section and/or Board). The conference proceedings are sold to libraries and individuals, and they are also distributed through booksellers.

The TAB Products-Conference Proceedings staff under the general oversight of the volunteer TAB Conference Publications Committee administers the Conference Publication Program.

The Conference Publication Program has a standing commitment to supply the proceedings of IEEE conferences to several hundred libraries worldwide. It handles individual post-conference sales on a centralized basis, with prices to members lower than those to non-members.

By assuming this function, the Conference Publication Program assures wide distribution of conference proceedings. It also relieves conferences of the burden of handling proceedings after the conference is completed. In practical terms, it permits conferences to close their financial records soon after the conference is held.

Participation in the Conference Publication Program adds further value by providing abstracting and indexing of all individual conference papers for inclusion in worldwide databases, thus assuring full recognition of the material presented in these conferences. Furthermore, centralized marketing and sales of IEEE conference proceedings is a direct service to IEEE members as well as to non-members.

Several hundred libraries subscribe to the various Order Plans (subscription packages) offered by the Conference Publication program. These subscribers prepay in advance for the conference proceedings they expect to receive. Thus, there is a contractual relationship between the subscribers and the Conference Publication Program. It is most important that conferences fulfill their obligations to the Conference Publication Program by providing the number of books ordered.

Organizing Committees should contact the TAB Products-Conference Proceedings office early in the planning cycle so that the Conference Publication can, through this office, indicate the number of proceedings required. Once the number of proceedings has been agreed upon, it must be viewed as a binding agreement between the conference and the Conference Publication Program.

The Conference Publications Committee, working with the IEEE staff establishes a schedule of payments for conference proceedings. The schedule is reviewed on an annual basis and adjustments are made as needed. The payments are set to exceed average production costs of the proceedings by a margin of 20-25%. In addition to paying for the conference proceedings, the Conference Publication Program reimburses the conference for the costs of shipping these proceedings to its warehouse.

It is the aim of the Program to make participation beneficial to conferences. Thus, conferences should expect to be reimbursed no less than the average expenses incurred in printing the copies needed by the Conference Publication Program. Although the payments normally exceed production costs by a margin of 20 – 25%, if under unusual circumstances the payment is less than these production costs, the conference may forward documentation, such as printing bills, to be considered for reimbursement of the additional expenses. Deductions from an acquisition payment may be imposed if

Note: Payments are subject to the approval of the Signal Processing Society and other IEEE Organizational Unit(s) involved in the conference.
the proceedings is not prepared correctly (i.e.; ISBN, Library of Congress and catalog numbers are missing or incorrect, copyright statement does not appear on reverse side of title page, etc.).

The operating costs of the Program include acquisition payments for proceedings to the conference, reimbursement to the conference of shipping costs, indexing, storage, handling, packaging and shipping to customers, as well as marketing and administration.

In cases where major conferences are co-sponsored with non-IEEE professional organizations, it is the responsibility of the IEEE sponsoring Organizational Unit to negotiate an agreement with the outside organizations that will allow IEEE to handle the post conference sale of conference proceedings in the same manner as for conferences entirely sponsored by IEEE Organizational Units. In some instances, it may be necessary to make exceptions to these guidelines in the interest of maintaining good relationships with these organizations. Such exceptions must receive prior approval through the Conference Services office.

**Conference Proceedings Composition**

The following guidelines are suggested as a checklist for the Publications Committee to follow in the assembling and the printing of the conference proceedings.

**Selection of Printer**

The Publications Committee shall obtain cost estimates or bids from reliable printing firms for production of the proceedings and select the conference printer(s). IEEE Publishing Services will also bid on the publication, if so requested. Upon request, IEEE TAB Products-Conference Proceedings will recommend printing firms familiar with IEEE work. Arrangements for all printing, including establishing proper deadlines for each phase of the work, supplying text and illustrative material, approving proofs and specifying the quantities to be printed, are the responsibility of the Publications Committee.

**Timetable**

The Publications Chair should establish a timetable with the printer that is consistent with the overall conference planning schedule. The schedule should indicate key dates for the Publications Committee, including the date when manuscripts must be submitted and the date when the printed proceedings must be delivered for distribution at the conference and to IEEE TAB Products-Conference Proceedings. The printer should be given precise delivery instructions, and prior arrangements with the receiving agency are to be made to ensure the proceedings are available when required.

**Format**

The Publications Committee will determine the layout and format of the conference proceedings using the following guidelines. Additional assistance may be obtained from IEEE TAB Products-Conference Proceedings.

**Use of IEEE Logo and Logo Type “IEEE”**

The IEEE Logo is registered with the U.S. Patent & Trademark Office and therefore must be accompanied by the ® (“Registered Trademark”). The IEEE Logo should appear on the front cover of all IEEE owned/copyrighted publications/printed products. It is recommended that the Logo appear on publications’ spine and back cover.

The full name (“The Institute of Electrical & Electronics Engineers, Inc.”) must appear on the copyright page of any conference proceedings to which IEEE holds copyright. The full name should also appear in a prominent position, such as the cover or title page of all proceedings.
When used with a logo of an organizational unit within IEEE, the IEEE logo must be at least the same size as the other logo; preferably larger or in a more prominent position. When used with logos of other societies, normally all logos should be the same size. (It may be acceptable to use logos in different sizes if society participation is unequal.) A conference logo may be larger than the IEEE Logo.

In the case of for-profit organization, the right to use the IEEE Logo can be given to other organizations to use in exchange for royalty payments. In the royalty agreement, the IEEE must have the right of approval for all uses of the logo. The royalty agreement is normally by contract signed by the IEEE Executive Director. The free use of the IEEE's name and logo by a for-profit organization is prohibited. Such free use would jeopardize IEEE's 501(c) (3) non-profit status.


**Table of Contents**

Each conference proceedings should include a table of contents. It is recommended that this table of contents include both the author's name and affiliation for reference purposes. Responsibility for the preparation of a table of contents for the conference proceedings should be assigned to an individual member(s) of the Publications Committee by the Chair.

**Placement of Required Numbers**

The IEEE catalog number should be shown on the spine and the reverse side of the title page. In addition, the Library of Congress Number, the ISBN and the ISSN (if applicable) should be shown on the reverse side of the title page. These numbers are supplied through IEEE TAB Products-Conference Proceedings.

**Title**

The exact title of the conference proceedings should be shown on the spine, front cover, title page and reverse of the title page. It is imperative that the title of the proceedings remain consistent with those of previous years. For further instructions regarding continuity in the titling of conference proceedings, IEEE TAB Products-Conference Proceedings should be contacted (IEEE Policy and Procedures 6.3.3).

**IEEE Copyright Statement**

The IEEE copyright statement should be shown on the reverse of the title page, with "20XX" representing the year of publication:

Abstracting is permitted with credit to the source. Libraries are permitted to photocopy beyond the limit of U.S. copyright law for private use of patrons those articles in this volume that carry a code at the bottom of the first page, provided the per-copy fee indicated in the code is paid through Copyright Clearance Center, 222 Rosewood Drive, Danvers, MA 01923. For all copying, reprint or republication permission, write to Manager, Copyrights Office, IEEE Service Center, 445 Hoes Lane, Piscataway, NJ 08855-1331. All rights reserved. Copyright © 20xx by The Institute of Electrical and Electronics Engineers, Inc.

**Layout, Cover, Binding**

Standard book paper size is 35" x 35" which represents sixteen, 8-1/2" x 11" sheets. Therefore, it is recommended that the publication be assembled in multiples of 32 pages. Lesser page add-ons are disproportionately costly. Fifty-pound white offset husky or equivalent substitute is the normal paper stock used for conference proceedings.
The front and back covers of the conference proceedings should be on the same type of coated stock. It is only necessary that the stock be coated on the outside cover. In some instances, it may be less expensive to use a white-coated stock (e.g., Ten Point Carolina) and overprint multiple colors rather than purchase color-coated stock.

Perfect binding is recommended because it is generally less expensive, more professional in appearance and durable.

**Tab Publication Committee Policy**

**Conference Proceedings Disseminated Electronically**

With the increased use and acceptance of efficiently disseminating information via the World Wide Web/Internet, the Conference Publications Committee is aware that some IEEE Organizational Units (OU), (Societies, Regions, Sections, Boards, etc.) are exploring its use in making their conference proceedings (either in total or in part) electronically accessible.

The Conference Publications Committee supports this exploration and endorsed the following policy regarding IEEE Copyright material appearing electronically:

- If placing conference proceedings electronically on the WWW/Internet (in total or in part), the OU responsible for the conference proceedings shall notify the Conference Publications Committee that they (the OU) approve such placement; and
- The Society will be responsible for obtaining and placing within the body of the document the appropriate copyright statements and permissions, which shall be obtained from the IEEE Copyright Office.

It should also be noted that as part of the Conference Publication Program, conference proceedings are purchased from conference sponsors in hard copy form for the purpose of fulfilling subscription commitments and post-conference single sale requirements. Placing a conference proceeding on the Web/Internet has the potential of affecting the revenue stream from the sale of such hard copies. Therefore, an IEEE OU, which elects to freely disseminate their conference proceedings on the Web/Internet, should give careful consideration to the anticipated income it expects to receive from the hard copies sold via the Conference Publication Program.

**IEEE Letter of Acquisition**

Upon the receipt of your IEEE Conference Publication Form, IEEE Conference Publications Product Management will issue you an IEEE Letter of Acquisition with information regarding:

- Material required (electronic files, print copies, etc.)
- Estimate of the amount to be paid for acquisition of this material
- Catalog numbers that must appear in your publication
- Copyright information
- Description of other documents.

**U.S. Export Compliance Regulations**

Conference organizers should also familiarize themselves with two key U.S. Export Compliance Regulations as described by the U.S. International Traffic in Arms Regulation (ITAR).

**Abstracting and Indexing**

Abstracting and Indexing, or secondary publishers, are independent third parties who are generally focused on a specific discipline and have independent editorial and business terms.
The IEEE Conference Publication Program makes every reasonable attempt to ensure abstracts and index entries of content accepted into the Conference are included in databases provided by independent abstracting and indexing services, such as Elsevier's Ei Compendex, IET's Inspec and Thomson Reuters' Web of Science.

For Elsevier’s Ei Compendex, abstracts and index entries for article submission are only considered for inclusion if (1) your submission is available as a full-text article in PDF format (submissions converted from multimedia formats such as Microsoft PowerPoint do not constitute full-text article); and (2) your submission includes an author-submitted abstract.

So that your authors may be made aware of this process and comply with the agreed-upon format, please make this information available to your authors via your website and Call for Papers.

It is important to include the following information in the Call for Papers:

- Author’s Guide
- IEEE Copyright Form
- IEEE model paper (if needed)
- Location for downloading information and forms (e.g. paper format, Advance Program, Registration Forms, etc.)
- PDF format for preparing the manuscript
- Sample of point sizes for visuals

Work with the Local Arrangements Committee

The Publications Committee Chair needs to work closely with the Local Arrangements Chair for printing of the signs, menu, Conference Programs etc.

Work with the Technical Program Chair

The Publication Committee Chair needs to work closely with the Technical Program Chair for the coordination of the Call for papers and the collection of papers for the Conference Proceedings.

Work with the Finance Chair

The Publication Committee Chair needs to work closely with the Finance Chair for the budget items assigned to the Publications Committee. These items tend to vary from conference to conference but may include any of the following:

- printing costs
- pricing of publications

Publicity Chair

The Publicity and PR Chair is responsible for the coordination of the publicity necessary to the conference.

Key Responsibilities:
• Arrange for mailing of the Call for Papers
• Arrange for publicity mailing lists
• Arrange for placement of the Conference on the Calendars of various publications
• Advertise the Conference in IEEE and non-IEEE publications and news media
• Arrange for local publicity of the Advance Conference
• Arrange for advertising in related conferences

**Advertising the IEEE Conference**

• Society & Other Professional Magazines
• Geographic & Technical Newsletters
• National Press (newspapers, engineering society magazines, technical society publications, etc.)
• Radio
• TV
• Promos at related conferences
• Arrange for Mailing of the Call for Papers
• Arrange for Publicity Mailing lists
• Arrange for Local Publicity in advance of the Conference

Filling out an Information Schedule for your IEEE Conference will provide you free advertisement on the Conference Database Search which is updated daily. Organizers use this to schedule & avoid conflicts with similar conferences. Also make sure to include the conference URL for the Conference Database Search. The SPS Conferences staff will assist you with advertising in Signal Processing magazine and placing the Conference on the SPS web site.

**Local Publicity**

When the meeting is held at a university, governmental facility or a local institute, the Publicity/Public Relations Department of the involved agency can be of assistance in generating interest among the local press. Normally, all scientific and federal agencies have public relations departments which are willing to publicize events of this type and will contact local newspapers, television and radio stations.

**Conference Calendar Listing In Appropriate Publications**

Such basic information as the city, hotel, dates, name and address of contact, as well as telephone and fax numbers are required to be listed.

**Welcome by Local Public Officials**

The committee may contact public official’s office early to obtain the aforementioned in a timely manner. Depending on the location, officials such as the Governor or Mayor may be sufficiently interesting to be considered as a speaker at the conference.

**Conference Preview**

It should be written by the Publicity Committee and includes brief highlights of the Conference about three months before the Conference, after the Technical Program has been completed.

**Press Kits and Arrangements at the Conference**

It is important to define policy early on regarding registrants who represent the press. Invitations to the press to attend the conference may be open or selective and normally limited in number from any one
publication firm. If selective, credentials must be checked at the conference, and free registrations given only to those invited. The members of the press who do attend the conference should receive a conference record and allowed free admission to all sessions, and to all social events which are likely to stimulate news coverage. A separate "Press Only" desk should be provided at Registration, and name badges should indicate that the attendee is with the press. A press room appropriately furnished and equipped with restricted WLAN access, should be provided, as well as light refreshments. It should be manned at all times, and its hours posted. If any significant announcements are made at the conference, or interviews requested, they should be coordinated by the Publicity Committee. Each member of the press should receive a press kit with a conference program, biographies of key committee members and speakers, copies of key speeches, an up-to-date release, and other pertinent information.

800 Number (or equivalent)

An 800 number is a great convenience to prospective registrants, and is another outlet for publicity for the conference. A digit format that is recognizable and easy to remember may be very useful.

Promotion of Local Industry Attendance

An excellent way to increase local attendance is to offer local companies a discount on multiple registrations. The discount must be aggressive enough to appeal to senior management to whom the campaign should be directed. The mailing should go out no later than three months prior to the conference, and considerably earlier, if possible. If the Advance Program is not ready at the time of the mailing, the package should be sent out with the caveat that the Advance Program will follow. This promotion is a joint effort of the Registration, Finance and Publicity Committees.

Promotion at Related Conferences

An excellent way to promote the conference is to exhibit at other conferences and trade shows. The Call for Papers, preliminary announcements, and Advance Programs can be distributed at such events. A video or slides of the conference city, giveaway items, and other novelties with the conference logo help promote the conference. This activity should be coordinated with the Exhibits Chair.

Post-Conference Article

An article highlighting the events, speakers, special announcements and the like should be prepared for insertion into IEEE and other Magazines, preferably within a month or two of the conference. The bulk of the article can and should be prepared well before the conference, as momentum and enthusiasm wanes once the conference is over. Statistics may be inserted into the article after the close of the conference. The article should include photos of events such as receptions, speakers, exhibits, committee members, awards, banquet, and other social events. It is recommended that a paragraph at the end of the article be reserved for promoting the next conference. Include basic information such as dates and location, and any other information of interest.

Photographer

The use of a designated photographer is recommended to ensure usable photos and timely turnaround. Black and white photos are preferred for reproduction.
Announcements, Advance Programs and Registration Material

IEEE e-Mailing Lists

IEEE membership e-mailing lists may normally be used in connection with conferences which have IEEE involvement. Selection of mailing lists should begin during the initial planning stages of the conference and the Publicity Chair should work with the Organizing Committee in selecting those target membership lists, Societies and other IEEE entities, which will most effectively promote the conference. SPS staff will assist the Publicity Chair in obtaining appropriate IEEE e-mailing lists. A letter requesting the e-mailing address list should be forwarded to SPS staff with the following information:

- name and dates of conference
- What is being e-mailed (Call for Papers, Advance Program, etc.)
- which IEEE Society members are to be selected
- Geographic area(s) to be selected (regions, sections, etc.)
- membership grade(s) (higher grade, student, affiliate)
- when selecting TIP (Technical Interest Profile) categories indicate which rankings are to be selected
- to whom to send the e-mail address, if IEEE is not providing e-mailing services
- to whom to send the bill

It is prudent to allow one month for this activity.

Proprietorship of e-Mailing Lists

Normally, only the e-mailing lists of the sponsoring Organizational Unit(s) or cooperating unit will be made available to the conference by IEEE. However, access to e-mailing lists of other IEEE entities is also possible. SPS staff should be contacted for further information.

Special e-Mailing Lists

The Publicity and Public Relations Committee should determine which means will achieve the widest publicity desired by the conference. E-mailing lists, not already available from other sources, should be compiled by this committee. Registration lists from previous meetings are generally very effective.

Local Mailings

The Publicity Chair should determine what local e-mailings should be made and provide programs for this purpose. An IEEE geographic e-mailing may be coordinated with the Local Arrangements Chair.

Publicity e-Mailings through IEEE

IEEE Conference Services has a special publicity list for the distribution of conference promotional material, e.g., Call for Papers and Advance Programs. The IEEE Conference Services Office via the SPS Staff will advise the Publicity and Public Relations Committee of the numerical requirements for these special e-mailings. Such promotional material and a request letter for these services should be forwarded to SPS Staff for distribution.

Promotional material for publication in IEEE periodicals should be submitted with attention paid to the monthly, bimonthly or quarterly schedules and deadlines. Promotional material should be organized in a standard format and contain complete information about dates, location, technical program, keynote speakers, registration procedures, conference papers, inspection tours and hotel reservations.
Advance Copies of Papers

The Publicity and Public Relations Committee may also assist the Program Committee in securing advance copies of papers so that pre-conference releases can be prepared for the general press. Complete papers may also be made available for review by the technical press and certain members of the technical community. The following statement must be placed on any paper released for review:

Permission to copy without fee all or part of this material is granted provided that the copies are not made or distributed for direct commercial advantage, the IEEE copyright notice and the title of the publication and its date appear, and notice is given that copying is by permission of the Institute of Electrical and Electronics Engineers. To copy otherwise, or to republish, requires a fee and specific permission. Direct inquires to: Copyrights Office, IEEE Service Center, 445 Hoes Lane, Piscataway, NJ 08855-1331.

Categories of Promotional Material

Publicity Letter

A publicity message specifying the particulars of the conference should be prepared. It should incorporate a condensed program that outlines the general chronological schedule of technical sessions, and highlights any special keynote presentations.

Conference Program

The Publicity and Public Relations Committee is involved in the distribution of the Advance Program. It is responsible for targeted publicity using the Advance Program.

Call for Papers

The Publicity and Public Relations Committee, in coordination with the Program Committee, may also be involved in the distribution of the initial conference's Call for Papers. Appropriate care should be taken to ensure that both the scope of the conference program and specific deadlines for abstracts and/or manuscripts are clearly indicated in the announcement. It should include such basic information as the name of the conference, the dates, the city and the hotel. The body of the call should announce the theme of the conference, suggested topics for papers, author schedule and instructions, regional representatives, and sponsorship with appropriate logos.

The Call for Papers is generally inserted in SPS Magazines and Newsletters. It may be distributed by e-mail to targeted audiences. Targeted e-mailing lists, or TIP (Technical Interest Profile) lists, may be obtained from SPS.

The Call should also be available for distribution at other related conferences and trade shows.

Work with the Program Chair

The Publicity and Public Relations Committee may assist the Program Committee in the following areas:

- Development of themes for panel discussions
- Selection of appropriate topics for keynote addresses
- Selection of speakers for social functions
- Development of appropriate publicity brochures regarding technical exhibits at the conference
Assisting Membership Promotion at Conference

It should be standard practice to set up a membership desk at the conference in order to recruit IEEE members into the Signal Processing Society and co-sponsoring Organizational Unit(s) and non-members into IEEE. A good incentive for membership efforts is to apply the member/non-member differential to reduce dues payment.

Membership Desk Activities

The following guidelines should be followed in arranging for a membership desk at the conference. Additional details may be obtained from IEEE Conference Services.

- Coordinate with the sponsoring Signal Processing Society membership development committee.
- Contact the Conference Chair to secure the best possible location of the Membership Desk at the Conference.
- Appoint Committee members to set up and supervise the activities of the desk.
- Prepare a duty roster to make sure that the desk is attended at all times during the conference.
- Arrange for the display of IEEE publications, literature and advertisement of its activities.
- Contact SPS staff to obtain available IEEE membership literature and supplies, including the loan of an IEEE banner and instructional guidelines for those assisting at the IEEE membership desk.

Conference Registration Card

The registration card should be designed to readily identify and allow later communication with non-members and those IEEE members who are not enrolled in the sponsoring entity.

Post-Conference Membership Promotion

The Publicity and Public Relations Committee should arrange for the addressing of special message to non-member registrants inviting them to apply for membership in IEEE.

Publicity - IEEE Publications

Educational Activities

Frequently an IEEE entity co-sponsors educational activities (short courses) which are run concurrently with a conference. It is important to ensure that the publicity and promotional materials for courses be coordinated with the publicity for the conference in order to present a unified IEEE image. The Publicity and Public Relations Committee should contact IEEE Conference Services to coordinate the promotion of these courses.

Sponsoring Organizational Unit(s) Publications

The Publicity and Public Relations Committee should coordinate all promotional concepts for the display and possible "sale" of other publications of a sponsoring Organizational Unit(s). In some instances, the complimentary distribution of previously published technical literature may be used as an additional promotional incentive in the recruitment of non-members at the conference.

IEEE Standards/Press Books

Brochures for these publications should be prominently displayed at all conferences. Conferences provide an ideal opportunity to promote IEEE book publications. Requests for assistance with promotional displays for book publications should be made through IEEE Marketing.
IEEE Logo

The IEEE Logo/Master Brand should be used in promoting all IEEE Sponsored Conference and used in all visual media: Print, CD-ROM, Web, and Video. The IEEE, SPS, Co-sponsors, and the Conference Logo should appear at the top of the home page. It is forbidden for a logo of an organization that is not a legitimate sponsor to appear on the Conference web site.

Exhibits Chair

The Exhibits Chair is responsible for the coordination of the exhibits for the conference.

Key Responsibilities:

- Guidelines for Exhibits
- Exhibits Prospectus Preparation
- Exhibitor Contact
- Exhibit Prospectus Mailing and Follow-up
- Exhibit Technical Conferences
- Promotion at Society and Other Conferences
- Exhibit Space Layout and Usage
- Drayage Firm Selection
- Exhibitor Registration
- Security
- At Conference Responsibilities
- Exhibit Guide
- Call for Exhibitors
- When a meeting includes an exhibit, an invitation to exhibit is usually sent to prospective exhibitors. The Committee needs to prepare the Exhibits Prospectus at least a year prior to the conference, so that it is ready for dissemination at the previous conference.
- Sales
  - For most conferences, the Exhibits Committee will handle the sale of exhibit booth space and patron solicitations.
- Decorator
  - The Committee may hire a drayage company (also often a decoration company) which is responsible for storing, moving, and shipping exhibit equipment. In such cases, all financial and contractual commitments must first be approved by the sponsoring entity.

Exhibits

Initiate plans for a conference exhibition two to three years before the date of the conference in order to allow adequate time to obtain suitable hotel and exhibition space.

Budget

A conservative and practical budget must also be approved by the sponsoring entity. The conference budget should incorporate detailed information concerning the planned receipts and expenses for the exhibition.

The detailed budget for the exhibition is a part of the overall conference budget and should include:
(1) The price schedule for booths and an estimate of the anticipated number of booth sales.
(2) The projected costs to secure the necessary exhibition area and facilities.
(3) Detailed financial arrangements regarding the commission schedule of the Exhibit Manager, if one is utilized.
(4) Expenses related to the promotion of the exhibit, including printing and mailing of brochures, exhibitors’ catalogs, handling and exhibit guide printing.
(5) Anticipated travel expenses for the Exhibit Manager and staff, if utilized.
(6) Service costs that are directly related to the exhibition, such as: decoration, storage or warehouse services, drayage, utilities, special guards and insurance fees.

**Exhibit Manager Selection and Contract**

**Contracts & Legal Documents**

The contract with the Exhibit Manager should specify that all fees for the sale of exhibit space should be sent directly to the Conference Treasurer and all checks should be made payable to the conference.

**Exhibition Prospectus**

The Committee needs to prepare the Exhibits Prospectus at least a year prior to the conference, so that it is ready for dissemination at the previous conference.

The Prospectus consists of:

- General Information on the Conference
- Letter of Invitation
- General Instructions and Information
- Exhibit Contract
- Exhibit Rules
- Patron Application
- Exhibit Hall Floor Plan
- Registration Form (added only six months before conference)
- Advance Conference (added only three months before conference)

**Exhibitor Registration**

Advance registration packets should be sent to exhibitors approximately five months before the conference. They should include:

- Exhibitor Advance Registration Form
- Letter of appreciation for their participation
- List of Exhibitors to date, by name and address, and by booth number
- Hotel Layout and Exhibits Hall Layout
- List of Exhibitor action items
- Complimentary passes (if used)

**Registration Chair**

The overall responsibilities of the Registration Committee are the following:

- How registration will be handled, manually, computer, web, etc.
- Services provided by volunteers or contracted to a Registration Co.
- Registration Form
In addition to the Chair, the Registration Committee should have at least one or two secretarial or clerical assistants. The Chair and his assistants will be bonded for the duration of the conference via the IEEE Insurance Plan. Their duties are to handle advance registration and registration and ticket sales at the conference. The Conference Treasurer will prescribe procedures for the processing of cash, credit cards and other receipts.

The primary purpose of the registration committee is to ensure the registration process runs smoothly. It is the most visible of functions, and the first that the attendee encounters. Therefore, it is imperative that registration be efficient, orderly and friendly, as it tends to set the tone for the conference.

A second and very important function of the registration process is to give accurate and up-to-date information on anticipated attendance at all the social functions that will take place at the conference. The Local Arrangements Committee depends heavily on the Registration Committee for its food and beverage guarantees for all the social functions. The Finance Committee also depends on the numbers and projections of the Registration Committee to make forecasts and adjustments to the budget, if necessary.

A third purpose of the registration function is to gather data on the registrants for future use. The information is used for member solicitation purposes and future conference mailings. Future Organizing Committees use statistics on registration patterns.

**Specific Assignments**

- Account for all advance registration, record data in convenient form; remit all funds to Conference Treasurer in the following categories; (Advance Registration, Luncheons, Banquets, Inspection Trips, etc.). A tally of each category in terms of numbers of persons, as well as dollars, should be kept.
- Coordinate routing and confirmation of hotel reservations with the Hospitality Chair or directly with hotel management.
- Prepare name badges for inclusion with registration packages provided for each advance registrant, along with appropriate banquet and luncheon tickets.
- Confirm registration space requirements, including desired number of chairs and tables, with Meeting Facilities Chair.
- Provide for necessary supplies for registration desk, including blank badges, badges and ribbons for committee and staff members, programs and standard desk items (pencils, paper clips, staples, envelopes, and message pads and cash receipt forms).
- Develop detail plan of action for entire registration procedure at the conference covering the following:
- Provision should be made for at least one registration team to be at desk on the evening preceding the conference in order to process early registrants.
- Separate provisions should be made to process advance registrants in order to minimize waiting time.
- The assignment of a Cashier to registration desk should be confirmed with the Finance Chair. The Cashier's responsibilities is to make up individual cash boxes with adequate small change for each registration clerk, to check cash boxes in and out, to distribute meal tickets to appropriate clerks, to disburse petty cash on the authority of the Treasurer and to keep accurate current financial records of each account.
- Provision for processing on-site registration, badges, messages, assignment lists of relief personnel; arrangements for messenger service.
- Details of some of these functions are given in subsequent sections.

Registration Form

The most difficult and important task to be accomplished early on by the Registration Committee, and the task that requires the most interaction with other committees, is the development and design of the registration form. The deadline for the production of the registration form forces all other committees with input to the form to define, schedule, and price events that will take place at the conference. The Program committee has input regarding technical events. The Local Arrangements Committee has obvious input regarding all the social events that are available to registrants. The Publicity Committee is responsible for the dissemination of the form, and its schedule in part determines the deadline for production of the form. It is advisable that the entire committee proofread the form very carefully, as small errors can prove time-consuming and costly. The items below should appear on the registration form:

- Conference Title, Dates & Location
- Purpose of Content
- Sponsorship & IEEE Logo
- Contact Information (Home/Business)
- Prefix: (Prof., Dr., Mrs., Ms., Mr.)
- Last Name (Family Name/Surname)
- First Name, Middle Initial
- Affiliation (Organization/Institution/Company)
- Mailing Address
- Address 1
- Address 2
- City
- State/Province
- Zip/Postal Code
- Country
- Email Address (home/business)
- Telephone (home/business)
- Fax (home/business)
- Emergency Contact & Telephone
- Name for Badge
- IEEE Member Number
- Registration Fees
- Member/Non-member
- Advanced/On-Site
- Life Members/Retired/Students
- Guests
- Workshops
- Tutorials
- Exhibits
- Tours (information & fees)
- Social Events
- Hotel Information
- Transportation
- Special Air Fare Arrangements
- “Special Needs” on the form to comply with ADA requirements.

Some guidelines for the form design

Separating first and last name character boxes greatly reduces the possibility of transposing first and last name, also reducing the likelihood of printing an incorrect name badge. An incorrectly inputted name in the computer causes delays at the registration desk on-site, because the registration packet will not be easily found, and the attendee will rightfully request that his name badge be reprinted with his correct name. Most fields have a reason for being formatted in the way they are formatted, and should not be altered. It is recommended that all published registration forms be identical (the only exception to this is the on-site registration form from which the early registration rates should be deleted), and coded to identify source -- that is, early publicity, various publications, the advance program. Interaction with the publicity committee is required.

All events and items on the form that require payment should be priced in round currency units. This makes calculations simpler and precludes the need for coins during the conference.

Payment Method and Currency

At most conferences, cash, checks and credit cards are accepted. The IEEE accepts American Express, Visa, MasterCard, Discover and Diner’s Club. Although a fee must be paid to a credit card company, it is strongly recommended that some credit cards be accepted by the conference, for the convenience of the registrants. An attendee may fax/e-mail their registration and payment only with a credit card.

It is required by the Society that the conference ensures that the 3rd party processor (includes software used by the conference) is compliant with the new payment card industry security standard. PCI®.

Name Badges

The name badge for any conference should be easily readable, with letters large enough to read without squinting. Although this seems an obvious point, badges are rarely printed in this way. The badge itself should be large enough to accommodate the logo of the conference (which should NOT take up a significant portion of the badge), a bold and large-lettered name (24 pt. size), under which should be...
printed the individual's company name (in 12 pt. bold). The large-lettered name is a great help to many registrants who only see colleagues infrequently, and to exhibitors who wish to address an attendee.

Samples of Badge Data Layout:

<table>
<thead>
<tr>
<th>First Name</th>
<th>Full Name</th>
<th>Full Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Name</td>
<td>Organization</td>
<td>Organization</td>
</tr>
<tr>
<td>Organization</td>
<td>City, State, Country</td>
<td>City, State, Country</td>
</tr>
</tbody>
</table>

Clear plastic clip-on badge holders are the most commonly used type, and can be used by both men and women. However, a few pin back holders should be available for those people who may not be wearing a jacket or lapelled blouse or dress. Both types of holders must, of course, fit the size of the badge.

If identifying ribbons are to be used, the different colors and categories must be decided early in the planning phase. Coordination with other committee members on the types of ribbons required is essential. It is recommended that the quantities ordered of each type of ribbon be greater than the anticipated need, particularly if the ribbons are not being supplied locally.

**Assembly of Registration Packets**

Assembling the registration packets is a very labor-intensive task. To avoid rushing this process and the concomitant paper cuts on workers' hands; it is essential to plan for this workload well in advance. Workers must be scheduled and prepared to stuff many empty manila envelopes. The pre-registered registrants’ packets should be physically verified and double-checked against the original pre-registration form to catch any problems prior to the conference. This takes a great deal of time but the results are worth the extra effort. If it is done, there will be very few problems encountered with misspelled name badges or incorrect tickets with the pre-registered registrants.

Invariably, there will be material from other committees that will need to be stuffed in the pre-registrants packets, and in some cases in the packets of the on-site registrants. Deadlines for submission of material from other committees should be communicated well in advance so as to avoid an extra round of stuffing envelopes. Items such as Spouse's Hospitality information, Speakers' Breakfast information, and various invitations can and should be prepared well in advance and not given to the Registration Committee at the last minute.

It is important that the name of the attendee appear in the upper right corner of the packet, so that when the packets are assembled in cartons or bins (easily transportable to the conference site), the name will be easily readable. Packets should be arranged alphabetically.

**Supplies**

Computers, printers and office supplies such as scissors, paper clips, staplers, pens and pencils will be needed at the pre-and on-site registration stations. Other items that must be transported to the conference site are:

- Final programs
- Pre-Registration packets
- Binders with advance registration forms
- Committee meeting schedules
Assignments Carried Out During Conference

The Registration Chair or assistant(s) should be on hand at all times to answer questions and resolve problems that may arise during the conference. Approval of the Registration Chair is always required for issuance of session badges for the working press, which should be furnished, without charge, on presentation of credentials. Also, the Conference Chair should approve the list of names of any VIP registrants who are to receive badges without payment of a fee.

The registration system must be tested, the registration personnel trained, and the registration materials double-checked by the time registration opens, preferably one day prior to opening day of the conference. The registration area must be organized for ease of access, and a mock run-through carried out to see how well flows behind the registration desk traffic. The registration packets and other materials should be arranged in such a way as to facilitate movement and access.

The advance registration area could have several queues, alphabetically separated. Appropriate registration packets should be located at each queue position. The on-site registration desk may have one queue, as in a bank, to allow the registrant to proceed to the next available on-site station.

A special information desk should be set up in the registration area, and be highly visible, and preferably be situated in such a way that the attendee sees this desk before the registration desk. If this is not possible, questions about sessions, tours, the social events and the like can be referred to the information desk by the registration staff. This will lessen the amount of time it takes to process each registrant.

The screeners should roam the lines to assist and answer any questions that registrants may have, and to ensure that the attendee is waiting in the right line. A printout of all registrants by last name, first name, and company should be given to the screeners, who can check names of registrants.

The busiest times at the registration desk are the opening evening and the following morning, with a sharp drop-off after that. It is critical that the desk is fully staffed at both times. When the area is busy, the screeners and other registration personnel should be advised to politely ask registrants whose needs are not immediate (name changes, refunds) to return when it is less busy.

Evaluation Forms

The registration package should include a conference evaluation form or directions for accessing an online evaluation. This would help the sponsoring entity to make improvements based on attendee's feedback.

Assignments Carried Out after Conference

Registration lists and tabulations should be prepared as requested by the sponsoring entities. These lists should show if each attendee is a member of IEEE and/or a member of any of the sponsoring organization. Copies of registration lists should be furnished to the Conference General Chair for inclusion in the Final Report.
Finance Chair

The Finance Chair is responsible for the coordination of the finances for the conference. The Finance Chair should be competent in handling financial matters including banking, auditing and grant writing.

Key Responsibilities:

- Bank Accounts
- Insurance and Bonding
- Budget
- Cash Flow
- Income
- Expenses
- Auditing
- Records
- Cash Handling
- Financial Reports
- Conference Closing
- Final Report
- 1099 Request Form

Determine Preliminary Budgets

Conference budgets should be set to a minimum surplus of 20% over projected expenses.

Contact the Signal Processing Society Conference Compliance and Budgets Administrator [CCBA] for the budget template.

The Signal Processing Society has a unique budget template. Failure to submit the Conference budget in the approved format will result in delayed approval of the Conference by Signal Processing. A Conference Organizer should expect the budget form to take a few days to complete.

The following information is required on the Budget:

- Advertising Expenses
- Committee Expenses
- Meeting Expenses
- Travel
- Stationary
- Business Services (i.e. photocopying, administrative support, etc.)
- Communications (i.e. conference calls, E-meetings, etc.)
- Operating Expenses
- Bank Fees
- Registration Management fees
- Onsite Registration costs (i.e. staff, computers, Internet, workstations, etc.)
- Credit Card processing fees
- Conference Management Services fees
- Site Selection Travel and Expenses
- Production of Conference materials (i.e. design, printing, mailing, etc.)
- Shipping costs of materials
- Audio Visual equipment and labor
• Show Office equipment (i.e. computers, Internet, furniture, etc.)
• Security
• Awards and Plaques
• Give-away items and tote bags
• Gratuities
• Honorariums
• Proceedings for all registrants (i.e. CD, Flash Drive, etc.)
• Meeting Space Rental
• Music Licensing Fee paid to ASCAP and BMI
  (What is the music license fee?)
• Registration fee collection services
• Cancellation Insurance if required
• Auditor Fees
• Contingency
• Signal Processing Society Administrative Meetings (ICASSP and ICIP)
• Signal Processing Society Administrative Services
  o This entry allows the SPS to recover the cost of supporting Conferences that are
    not otherwise recovered. These costs include but are not limited to accounting
    services, processing forms, final reporting, answering volunteer inquiries,
    negotiating contracts, attending administrative and committee meetings,
    maintaining Conference schedule, Conference insurance, resolving problems,
    and closing the books.
  o This entry is required and should be 14%. Should this be a Co-Sponsored
    meeting the fee will be split among all the co-sponsors based upon their
    sponsorship percentage.

IEEE Conference Budget Requirements

• Prepare a budget indicating estimated income and expenses for the conference
• Submit at least 12 months in advance of the conference
• Accompanied by written SPS Conference Board approval and forwarded to
  sps.conferences@ieee.org for approval

Sponsoring Entities Approval of Budgets

Conference budgets must first be approved by the sponsoring entity prior to submission to IEEE

IEEE cannot accept a conference budget unless it is accompanied by written approval of the sponsors

Project Budget Surplus or Deficit

IEEE Policy stipulates that all conference budgets that are submitted for IEEE approval must be based on non-deficit expectations. Conference budgets should be set to generate a minimum surplus of 20% over projected expenses.

Preparation of Budget

The initial conference budget should be prepared on the form provided by SPS Staff.

Budget Revisions

If necessary, the Finance Committee may submit a revised budget to IEEE for approval.

If significant changes are made to the budget, e.g., decision to cancel an exhibition or conference proceeding publication, it is incumbent upon the Finance Committee to resubmit a conference budget
to the sponsoring entity and to IEEE accompanied by written approval from the sponsoring Signal Processing for IEEE approval. The same forms as used for the initial budget are used in preparing the revised budget.

**Organizing Committees**

It is the general policy of the IEEE that no member of a Conference Board or Committee or his/her immediate family shall receive monetary payment for services. This does not include awards or other honoraria that may be granted under IEEE Awards provisions as defined in IEEE Policies, Section 4.0. Immediate family is defined as spouse, domestic partner, brother, sister, children, mother, father, and in-laws.

**Conference Registration**

**Conference Registration Fee**

The Finance Committee, with the concurrence of the Organizing Committee and each sponsoring entity, establishes the conference registration fee.

Conference budgets should be set to generate a minimum surplus of 20% over projected expenses.

Other anticipated sources of revenue, such as exhibition sales and income from the sale of conference Proceedings/Digests, should also be taken into consideration when setting registration fees for the conference.

Signal Processing Society bases the registration fees on the total expense budget for the conference divided by the expected number of attendees plus 20%. The total expense must include the cost of producing and disseminating the proceeding plus 20 – 25% margin. Starting with this base number the fees are adjusted for the following registrant categories: IEEE Member/Non-Member, Students, Retired, and Life Members.

**IEEE Member/Non-Member**

IEEE Policy requires that registration fees for non-members at IEEE sponsored conferences be at least 20% above the IEEE member fee, the exact amount being set by each Organizing Committee.

Conferences may establish a registration fee lower than the IEEE member fee for sponsoring Signal Processing’s members.

At the discretion of the Organizing Committee, the IEEE member registration rates may apply to members of non-IEEE co-sponsoring, cooperating organizations, or sister societies.

IEEE members are entitled to member fees at Founding Society conferences.

**Non-Member Fee Differential towards IEEE Membership**

The Finance Committee, with the approval of the Organizing Committee and the sponsoring entity, may allow application of the fee differential paid by non-members at the conference to be applied toward IEEE membership enrollment.

If it is decided to allow the fee differential to be applied toward IEEE membership, the IEEE Membership Services Department should be consulted in advance to arrange for smooth processing and to avoid misunderstandings between the new member and IEEE.

If this activity is to be done at a meeting, then adequate conference publicity must be done to make it successful.
Students, Retired, Life Members

IEEE Policy permits reduced conference registration fees for students, unemployed IEEE members, retired and Life members and special VIP guests, at the discretion of the Organizing Committee and sponsoring entity. Unless otherwise stipulated, the registration fee for retired and Life members should be no more than the registration fee for students. These reduced registration fees may exclude meal functions, Conference Proceedings and other side activities.

Advance Registration

The advance registration fee is generally set lower than the on-site registration fee in order to stimulate advance registration.

Refunds

The Finance Committee, with the concurrence of the Organizing Committee establishes a specific policy with regard to refunds. Notice regarding the conditions for refunds with specific cut-off dates for the acceptance of refund requests should be included in the Advance Conference and other related promotional material.

Financial Management

At most conferences cash, checks and credit cards are acceptable. An attendee may fax/e-mail their registration and payment only with a credit card. The IEEE accepts American Express, Visa, MasterCard, Discover and Diner's Club.

Bank Accounts

Establish a Conference Bank Account for receipt and disbursement of conference funds (IEEE Concentration Banking is strongly recommended)

Account Identification

IRS regulations require that all conference bank accounts in Regions 1-6 be opened as "The Institute of Electrical & Electronics Engineers, Inc., and d/b/a Year IEEE Conference Title.

- Accounts must never be in an individual's name
- IRS Tax Identification Number
- IEEE conferences sponsored by entities, other than Sections or Regions, holding funds outside the IEEE treasury is 13-1656633
- Section or Region-sponsored conferences have been assigned a uniform identification number of 13-6117748

Signatory Powers for Bank Accounts

Require that all conference bank accounts have alternate signature designated. The minimum signatures for an account are:

- One volunteer from the Organizing Committee, usually the Finance Chair (or Treasurer).
- One volunteer alternate from the Organizing Committee, usually the Conference Chair.
- The IEEE Staff Director Financial Services or designee. Alternate signatory arrangements may be necessary for non-U.S. conferences.
IEEE Requirements - It is the responsibility of the Conference Treasurer to report to IEEE at the end of each calendar year, indicating:

- Principal Amount
- Annual Accrued Interest
- Account Number, Name and Address of any financial institution at which any open conference account exists.

The Institute requires this information for its IRS Information Return.

**Closing of Bank Accounts**

IRS regulations require that all IEEE conferences close their accounts and submit a Final Financial Report to the appropriate IEEE Signal Processing(s) within six months from the close of the conference. IRS regulations stipulate that all surplus funds from the conference first be deposited in the sponsoring entity's IEEE Headquarters account before they can be withdrawn for use as advance funds for a future conference.

If an IEEE Region is acting as a single sponsoring entity, all conference surplus funds must first be deposited in the established Region account before withdrawal for further use, i.e., distribution to Sections.

It is the responsibility of the Conference Finance Chair to ensure that this procedure is strictly followed in order to protect IEEE's not-for-profit tax status.

**Conference Loan Request**

Conference loans may be requested from the Signal Processing anytime during the planning cycle. The Signal Processing will approve the loan and contact your CMS or PCO to process the request.

Conference loans are required to be repaid within one (1) month after the conference.

**Insurance and Bonding**

Conference insurance and bonding is automatically purchased when a Conference is approved and recorded.

It is recommended that cancellation insurance also be purchased for all meeting over 1,000 registrants and /or having over 100 exhibits booths.

This is necessary to minimize financial exposure to sponsor, if the meeting must be canceled at the last minute.

**Miscellaneous Financial Activities**

**Petty Cash**

- Cashier
- General
- Duties
- Security
- Cash Boxes

**Travel Expenses for Participants**

Explicit policies must be established in advance regarding the payment of travel expenses for participants.
These travel expense payments should be incorporated in the conference budget.

IEEE Policy prohibits payments of honoraria for the presentation of a paper at a conference, except for a lecture or other educational activity for which a tuition fee is charged.

**Exhibits**

Treasurer is responsible for the receipt and deposit of all funds from exhibitors.

**Credit Cards**

Credit Cards are very helpful for registration, especially for registrants from outside the U.S.

Credit card procedures and machines may be obtained by contacting IEEE Your POC.

All transactions should be verified in a timely fashion, and the credit card slips should be sent to IEEE without delay.

**Government Grants**

- All grant proposals must be approved by the IEEE Development Office.
- All grant proposals must be signed by a conference representative serving as the Principal Investigator or an authorized IEEE staff person.
- Mail the original grant proposal with the conference representative’s signature to: IEEE Development Office, 445 Hoes Lane, P.O. Box 1331, Piscataway, NJ 08855-1331, Attn: Development Operations Manager, retaining a copy for the conference records.

The Development Operations Manager will review the grant proposal for compliance to the government agency's requirements, obtain the necessary IEEE authorizing signature, and submit the appropriate number of copies of the grant proposal with a cover letter to the government agency.

[How to Obtain Government Grants](#)

**Conference Final Financial Reporting**

Financial Reporting Workbook incl. Budgeting, Summary, Revenue and Expense detail forms

**General**

- Prepare a final report by completing the Summary Financial Report form
- Report should be filed no later than six months after conference date
- Repay all Loans
- Distribute Conference surplus (according to prearranged policies)
- Confirm that all physical assets have been distributed (i.e., conference proceedings or digest)
- Close the conference bank account
Audit of Financial Records

- Requirements for auditing of conferences as approved by the IEEE Board of Directors (Section 9.5.3)
- Determination of Surplus, Disposal of Physical Assets and Loan Repayment
- Sale of conference Proceedings to the TAB Products Conference Proceedings
- Final Financial Report
- Copies of the completed report to each sponsor and to the IEEE within six months of the end of the conference
- IEEE Financial Web Form to submit financial data related to your conference. Be sure to have the conference record number assigned when you completed the Information Schedule.

Conference Bank Account

- Should be closed at the time the Final Financial Reports are prepared
- No funds will be applied as partial surplus until all obligations (loans) have been met
- Before issuing the Final Report, Conference Treasurer should
  - Perform a final bank statement reconciliation
  - Ask the bank to issue a cashier’s check payable to IEEE in the amount of the reconciled bank balance
- Final bank balance should agree with the amount shown as surplus on the Final Financial Reports minus any amounts that have been prepaid to the Society accounts as partial surplus
- The following notation should appear on the payment advice portion of the check
  - "To close the checking account of the 20XX IEEEXXXXX Conference."
- This will provide documentation that there is no balance left in account

Conference Financial Record Retention

Supporting documentation associated with all conference financial transactions should be retained by the appropriate sponsoring society for a period of seven years following the conference. Records that should be retained include paid invoices, expense vouchers, hotel agreements, printing and A/V contracts, registration summary reports, exhibitor summary reports, bank statements and canceled checks, etc.

World-Wide Tax Compliance Alert

All Conferences must contact the IEEE Tax Compliance Department regarding tax and business registration requirements. The laws for doing business in each state, province and country vary therefore specific tax and business registrations may be required. A conference should never make contact with any Tax Authorities without first contacting the IEEE Tax Compliance Department for instructions, +1 732 562 5334 or 5351.
VAT and GST Information - current as of 27 February 2008

VAT (Value Added Tax) and GST (Goods and Services Tax) are typically non-U.S. consumption taxes imposed on sales of goods by businesses at each stage of production and distribution, and on sales of services as they are rendered. For purposes of the VAT or GST tax, the term "business" includes any activity carried on, whether for-profit or not-for-profit, that involves or is intended to involve the sale of property or services. VAT and GST is a tax on consumer expenditures and in theory should not fall on business activities. This is achieved by the input/output system. When a business operating in a VAT/GST country buys goods or services it pays tax to the supplier, which is called an input tax. When the same business sells goods or services, whether to another business or to a final consumer, it is required to charge tax, which is called an output tax. The business then must periodically total the input tax and deduct it from the output tax, paying the excess output tax to the government agency responsible for collecting it.

IEEE, in most cases, is not subject to these taxes, but in situations where IEEE is sponsoring an IEEE conference in a VAT/GST assessing country, they are required to register to collect VAT/GST on sales of conference admissions and other product sales. Again, the tax that they collect is called an output tax, but any of the VAT/GST tax that they paid to vendors in that country (input tax) can be deducted from the output tax owed to the governmental agency. In a country that requires registration for IEEE conferences, the determination if you have to register is based on where the services are performed. If the services are performed in the VAT/GST country, regardless if the registration fees are collected in the U.S., then the conference is required to register and collect these taxes.

Non-European Country

IEEE conferences are required to register and collect VAT/GST, must also have a periodic reporting of the tax to the government. Many conference Treasurers and Organizing Committees use VAT/GST tax vendors to administer the process, for which they charge a flat fee or a percentage of the tax collected. You can obtain VAT/GST vendors from local in-country directories or accounting firms. In the event one cannot be found, please contact the IEEE tax department for a referral.

European Country

In the event a conference is held in Europe, in 2009, all such conferences will be required to use the new VAT Reporting System that has been designed by the IEEE Conference Group, the IEEE Tax Dept. and Deloitte and Touche, CPAs. Conference activities in Europe must be processed through the newly organized Limited Liability Company, IEEE International LLC, which is currently being registered for VAT in most European Countries, If you are organizing a conference in Europe, please contact the Meeting and Conference Group for more information on this subject.

Please contact the IEEE Tax Department for current updated information when planning a non-European IEEE Conference or other event that may require the registration of VAT/GST taxes: tax-compliance@ieee.org.

Tax Information for Conferences
Independent Contractor Procedures

Independent Contractors vs. Employees & IRS Form 1099-Misc Reporting Requirements

Use of the 1099 Request Form (Alternate to W9 Form)
Post Conference Responsibilities

(General Chair & Organizing Committee)

- Wrap-Up Session
- Preparation of Final Report
- Financial Accounting, including return of loans, surplus and audit
- Letters of Appreciation
- Conference Article
- Conference Statistics

The post-conference activities include the completion of the financial and administrative commitments of the conference, production of the Final Report, and notification to the sponsoring entity of the final results within a reasonable time.

The Final Report and all supporting materials must be sent to the Signal Processing Society office. Do not send them directly to IEEE Conference Finance. SPS Staff will make sure that all the required forms are complete and the necessary information is included. Should any time be missing or incomplete the SPS Staff will contact the General Chair and/or Finance Chair to complete the forms and acquire complete information.

Wrap-Up Session

The first official "post-conference" activity which occurs is the wrap-up session. It is traditionally held during the afternoon of the last day of the conference. At the wrap-up, an abbreviated version of the conference activities should be presented so that attending future conference chairs can get an overall picture of conference activities with the attendant caveats.

Letters of Appreciation

As soon as possible following the close of the conference, the General Chair and Organizing Committee should send out letters of appreciation to all who have contributed to the success of the conference. Here are some people that the letters should be written to:

- Workers
- Volunteer Groups
- Supervisors of individuals who have made significant contributions
- Speakers
- Exhibitors
- Patrons
- Session organizers
- Etc

Conference Article

As soon as possible after the conference, the Publicity committee should have available for publication in IEEE Magazines an article and related photos. Much of the article may be written in advance of the conference, and statistics added after the conference closes. Reference should be made to the dates and location of the next conference.
Repay Loans within 30 days after Conference

NOTE: Conferences are not allowed to transfer loans from one year's conference to the next.

When repaying loans and distribution of surplus - Please identify checks by indicating the name and dates of the conference

Submit a Detailed Final Financial Report

This should be filed no later than six months after the conference date.

IEEE Financial Web Form to submit financial data related to your conference. Be sure to have the conference record number assigned when you completed the Information Schedule.

Financial Reporting Workbook incl. Budgeting, Summary, Revenue and Expense detail forms

Distribute surplus/loss

When repaying loans and distribution of surplus - Please identify checks by indicating:

- Conference Name
- Dates of Conference

Close Bank Accounts

IRS regulations require that all IEEE conferences close their accounts and submit a Final Financial Report to the appropriate IEEE Signal Processing(s) within six months from the close of the conference. IRS regulations stipulate that all surplus funds from the conference first be deposited in the sponsoring entity's IEEE Headquarters account before they can be withdrawn for use as advance funds for a future conference.

IEEE Policy 10.1.11 requires all conference to close their financials within 6 months. If not closed by the 13th month after being held, a penalty fee will be accessed.

Concentration Banking

IEEE Policy - Conferences (10.1.8)

IEEE Conferences Organization Manual - Section 9

Requirements for Audits of Conference Financial Activates

IEEE Conferences, Workshops and Meetings are required to have an Independent Audit of their financial activities, if the meeting’s receipts or expenses equal or exceed $100,000 and IEEE sponsorship of the meeting is greater than 50% (51% or over). The IEEE Operations (Internal) Audit Department or an independent outside accounting firm may complete the ‘agreed upon procedures’ audit of the meeting’s financial statements. The fee for the Operations Audit Department to complete the audit is .006 of the greater of total conference receipts or total conference expenses, not to exceed $6,000.

Contact Information: IEEE Operations (Internal) Audit Department +1 732 562 6371 or 6533

Conference Audit Material Checklist (MS, 1KB)

Areas to be tested in Conference Financial Audits
General Audit Conference Steps for Audits of IEEE Conferences

Suggested Procedures for the Audit Committee

IEEE Conferences Organization Manual - Section 9.5.3 (Audit of Financial Records)

IEEE Conferences Organization Manual - Section 10 (The Audit Committee)

IEEE Policy - Conferences (10.1.10)
Glossary Conference Organizing Terms

Attrition
A specific provision in a contract that has been agreed upon in writing by the hotel and the SPS; provides for payment of damages by SPS to the hotel when the Conference fails to fulfill its specified percentage of contracted room nights or its specified percentage of food and beverage or both.

Banquet Event Order [BEO]
Detailed instructions for a particular event prepared by the facility; also known as a résumé sheet or function sheet; includes detailed instructions related to room setups, food and beverage. These are crucial to the Hotel internal process and must be scrutinized by the Conference Organizer and/or POC and signed to confirm all set ups and costs.

Call for Papers [CFP]
An invitation to submit topic ideas for the conference; document containing detailed instructions for submission of papers for assessment and selection by a review committee; often referred to as “abstract forms”

Certificate of Insurance [CIO]
A document to prove that IEEE is carrying sufficient insurance coverage as required by a third party; or vice versa.

Concentrated Banking [CB]
A Concentration Banking Account is a checking account for an individual Conference that is set up by the committee to make the paying of invoices and collection of funds more simple and immediate.

Conference
A conference is a technical meeting in which expected attendance will exceed 300 registrants.

Co-Sponsorship [CS]
The SPS shares the financial and legal liabilities according to the percentage of sponsorship. All assets, tangible and intangible, shall be the property of the sponsors in proportion to their respective share of the meeting sponsorship. The financial commitment must be stated in the steering committee charter and on each PROPOSAL because advance loans and any surplus or loss must be shared in proportion to the commitment.

Food & Beverage Guarantees
The hotel or conference center will require an estimate of the number of persons to be served for each meal function or food service such as coffee and water service. These guarantees are usually due 24-72 hours in advance depending on the type of function and the terms of the contract. The guarantee is the minimum number of persons or minimum quantity that will be billed by the hotel even if actual attendance or consumption is less. Almost every hotel will set and prepare for 5% over the guaranteed number or amount. If no guarantee is given to the hotel, the meeting will be charged for the original number of persons or quantities specified on the catering order or hotel contract. The original number could be significantly higher (over charged) or lower (not enough food or beverages served) than the actual number of persons served.

Inclusive vs. Exclusive
Food & Beverage, Hotel and many Conference services are quoted in either inclusive or exclusive terms. Inclusive pricing includes all the tax, fees and gratuity that will be charged. Exclusive does not include the tax, fees, or gratuity. It is important to budget for the inclusive price. Often hotels and conference centers quote their rates in exclusive terms with a notation about the current tax rate, flat fees and percent gratuity. These additional costs are typically non-negotiable and may change before your Conference.

International
The term “International” may be used in the title of the meeting only when the meeting will reflect an international character to a significant degree. Ordinarily this would require an active participation of the technical Organizing Committee of members from at least two national (three nations in the case of U.S. or Canadian meetings) and a reasonable expectation that the technical Conference will include a significant number of papers from at least one other nation.

Invited Papers
Invited papers are received from persons specifically requested from well-known authorities.

Master Account
A Master Account is the Conference’s account with a hotel or conference center. This account allows the hotel to consolidate the billing for services and send one invoice to the Conference organizer or POC. Typically the following items are charged to the Master Account: Meal Functions, AV, Meeting Room Rental, Staff Guest Rooms, Conference Business Center fees, Attrition Penalties, etc.

National
The term “National” should not be used in the title of an IEEE sponsored meeting

Open Call Papers
Open call papers are received in response to the Call for Papers [CFP] and are reviewed for acceptance.

Operational Unit
Operational Unit (OU) is defined as a society, division or group within the IEEE organization.

Pre-Con Meeting
This is a critical meeting that must take place two to three days prior to the start of a Conference. This meeting ensures that all parties have an understanding of the plan, expectations and chain-of-command for onsite decision-making.

Proceedings
The proceedings for any Conference consist of some or all of the following materials: Approved Papers, Video or Audio Recordings of presentations, Slides shown in presentations, Transcripts of presentations, Posters, Exhibitor Guide, all copyrighted materials, Tutorial Notes, Reprints, etc.

Request for Proposal [RFP]
[Also called Request for Quotes (RFQ) and Request for Information (RFI)]
A Request for Proposal (RFP) is a request for any type of business that will be contracted. For a Meeting Planner, RFPs most often go out to hotels for specific events. It includes the preferred and/or alternate dates needed for a meeting, the meeting space requirements, the food and beverage requirements, attendee needs, and usually a list of desired concessions. It is helpful to include more details to help the vendor prepare a proposal that most fits the needs of the Buyer. An RFP should include information about your organization and project as well as questions that elicit differences among competing companies. Question types should include both "Yes/No" responses as well as open-ended text questions.

Besides Hotels, RFPs can be for anything from Convention Center space to a dinner meeting to Decorator Services. Write an RFQ instead of an RFP. A request for proposal invites a supplier to focus on its marketing pitch. A Request for Quote (RFQ), on the other hand, is a statement of need from a company that mandates suppliers to focus on pricing, service levels, deliverables, and contract terms they can offer to meet the needs described. The RFQ should be phrased in precise but supplier-neutral language, with requirements clearly separated from optional components and/or niceties. Be sure to identify the pricing range budgeted for that supply, in doing so, you will save time for everyone.

A Request for Information (RFI) is a standard business process whose purpose is to collect general written information about the capabilities of various suppliers.

Run of House [ROH]
Run of House rooms are sleeping rooms of different Room types such as Single King Bed, Double Double Bed, etc.. The hotel typically has agreed to offer all “Run of House” rooms at the same price, depending on the availability at the time of check in any category of room can be offered to the guests.

Solicited Papers
Solicited papers or Stimulated Papers, are those received in response to requests by members to groups or individuals working in a particular area of interest.

Surplus
All Signal Processing Society sponsored meetings MUST budget for a 20% surplus. A surplus is calculated as follows:

\[
(\text{Expenses + Loan}) - (\text{Revenue + Loan}) = \text{Surplus (\$)}
\]
\[
\frac{\text{Surplus}}{\text{Expenses}} = \text{Surplus (\%)}
\]

Symposium
A symposium is a technical meeting in which expected attendance will exceed 100 registrants but not exceed 300 registrants.

Technical Co-Sponsorship [TCS]
A Conference that does not request financial support from IEEE SPS, however it would like to use the IEEE – SPS name and logo. Some TCS’s include access to SPS members for paper review or other predefined role in the Conference.

Tutorial
Tutorials are offered to allow a group of several persons with similar interests to hear a presentation by a noted subject matter expert. A tutorial is not necessarily associated with an accepted paper.

Workshop
A workshop is a technical meeting in which expected attendance will not exceed 100 registrants.
**Glossary of Acronyms**

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
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<tbody>
<tr>
<td>AA</td>
<td>Advance Announcement</td>
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<tr>
<td>ADA</td>
<td>Americans with Disabilities Act</td>
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<tr>
<td>AP</td>
<td>Advance Conference</td>
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<tr>
<td>ARR</td>
<td>Arrival</td>
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<tr>
<td>AV</td>
<td>Audio Visual</td>
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<tr>
<td>BEO</td>
<td>Banquet Event Order</td>
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<tr>
<td>BoD</td>
<td>Board of Directors</td>
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<tr>
<td>CA</td>
<td>Contract Administration</td>
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<tr>
<td>CB</td>
<td>Concentration Banking</td>
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<tr>
<td>CCBA</td>
<td>Conference Compliance and Budgets Administrator</td>
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<tr>
<td>CFP</td>
<td>Call for Papers</td>
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<tr>
<td>CMS</td>
<td>Conference Management Services</td>
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<tr>
<td>COI</td>
<td>Certificate of Insurance</td>
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<tr>
<td>CSM</td>
<td>Conference Services Manager</td>
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<tr>
<td>CVB</td>
<td>Convention and Visitor Bureau</td>
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<td>DEP</td>
<td>Departure</td>
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<tr>
<td>DMC</td>
<td>Destination Management Company</td>
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<tr>
<td>DSP/SPE</td>
<td>Digital Signal Processing and Signal Processing Education Workshop</td>
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<tr>
<td>EIC</td>
<td>Editor in Chief</td>
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<tr>
<td>ExCom</td>
<td>Executive Committee</td>
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<tr>
<td>F&amp;B</td>
<td>Food and Beverage</td>
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<tr>
<td>FinCom</td>
<td>Finance Committee</td>
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<tr>
<td>FP</td>
<td>Final Conference</td>
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<tr>
<td>GENSIPS</td>
<td>International Workshop on Genomic Signal Processing and Statistics</td>
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<tr>
<td>ICASSP</td>
<td>International Conference on Acoustics, Speech, and Signal Processing</td>
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<tr>
<td>ICIP</td>
<td>International Conference on Image Processing</td>
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<tr>
<td>ICME</td>
<td>International Conference on Multimedia &amp; Expo</td>
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<tr>
<td>ISBI</td>
<td>International Symposium on Biomedical Imaging</td>
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<tr>
<td>ISPN</td>
<td>International Symposium on Information Processing in Sensor Networks</td>
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<tr>
<td>ISSPIT</td>
<td>International Symposium of Signal Processing and Information Technology</td>
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<tr>
<td>LOA</td>
<td>Letter of Agreement</td>
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<tr>
<td>MLSP</td>
<td>Workshop on Machine Learning for Signal Processing</td>
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<tr>
<td>MMSP</td>
<td>Workshop on Multimedia Signal Processing</td>
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<td>MOU</td>
<td>Memorandum of Understanding</td>
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<td>OA</td>
<td>Operations Audit</td>
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<td>OU</td>
<td>Operational Unit</td>
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<tr>
<td>RFP</td>
<td>Request for Proposal</td>
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<tr>
<td>SAM</td>
<td>Sensor Array and Multichannel Signal Processing Workshop</td>
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<td>SIG</td>
<td>Special Interest Groups</td>
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<td>SIPS</td>
<td>Conference on Signal Processing Systems</td>
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<td>SLT</td>
<td>Spoken Language Technology Workshop</td>
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<tr>
<td>SPAWC</td>
<td>Workshop on Signal Processing Advances in Wireless Communications</td>
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<tr>
<td>SPS</td>
<td>Signal Processing Society</td>
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<td>TAB</td>
<td>Technical Activities Board</td>
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<tr>
<td>TC</td>
<td>Technical Committee</td>
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<tr>
<td>TCS</td>
<td>Technical Co-Sponsorship</td>
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Music Licensing

What is the music licensing fee?

Conferences that play recorded or live music at any function, whether held in the U.S. or not, are required by U.S. copyright law to pay royalty fees that pertain to the two major music licensing organizations, the American Society of Composers, Authors and Publishers (ASCAP), and Broadcast Music, Inc. (BMI). These organizations hold most of the licenses for publicly copyrighted musical compositions. According to United States copyright law, public performance of copyrighted music requires permission from the copyright owner or licensing agent (i.e. ASCAP and BMI).

Obtaining permission requires paying a fee to both organizations. Since each organization’s repertoire is different, and no copyrighted music appears in both, fee must be paid to both. The Signal Processing Society has a license agreement with both organizations and files quarterly reports on conferences.

Americans with Disabilities Act (ADA)

What is ADA and how does it affect my Conference?

The Americans with Disabilities Act (ADA) became U.S. Law in January 1992. The intent of the law is to ensure that persons with disabilities are not discriminated against; the ADA has significant implications for SPS Conferences.

The ADA requires that any activity or service open to the public, such as workshops and conferences, be physically accessible to persons with disabilities. In addition, “auxiliary aids” must be provided to assist persons with disabilities to actively take part in the conference. Auxiliary aids such as qualified interpreters, Braille materials, and large print materials must be provided.

It is generally thought that the conference facilities are responsible for making modifications to its building and otherwise eliminating physical barriers to access, while conference sponsors are responsible for providing any necessary auxiliary aids. However, the courts have interpreted the ADA law to hold both the facility and conference sponsors responsible for meeting its legal requirements. Therefore, the meeting facility contract should allocate the law’s requirements between the society and the meeting facility. The Society’s standard hotel contract contains this provision.

To comply with the ADA choose a site that is structurally ADA compliant, include the above mentioned provision in the contract, and request “special needs” information in the registration process.

Americans with Disabilities Act Compliance: The Hotel shall be responsible for complying with the public accommodations requirements of the Americans with Disabilities Act ("ADA") not otherwise allocated to the Group in this Agreement, including: (i) the "readily achievable" removal of physical barriers to access to the meeting rooms (e.g., speakers' platform and public address systems), sleeping rooms, and common areas (e.g. restaurants, restrooms, and public telephones); (ii) the provision of auxiliary aids and services where necessary to ensure that no disabled individual is treated differently by the Hotel the other individuals (e.g. Braille room service menus or reader); and (iii) the modification of the Hotel’s policies, practices and procedures applicable to all guests and/or Group as necessary to provide goods and services to disabled individuals (e.g. emergency procedures and policy of holding accessible rooms for hearing and mobility impaired open for disabled until all remaining rooms are occupied).